Getting more done through others: the basics of delegation
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When I suggest "delegate" as an option for getting things done, the most frequent objections are incredulity ("are you kidding - I don't have anyone to delegate to…"); horror ("I can do it faster /better myself"); or embarrassment ("I don't want to bother him/her with this small task when I can do it myself").   Even when the option seems desirable, there is a fear of poor follow up – and it may just seems easier to do it yourself.

As a 3rd year medical student I spent 6 weeks on the general surgery clerkship being supervised by a 3rd year resident who wanted to do everything himself. This was exemplified by his goal to beat the medical students to the ward every morning in order to do the wound checks and write the progress notes himself. If we came at 6:30 am, he came at 6:00. If we responded by coming at six, he came at 5:30 – and so on. One day our boss, the chief resident, asked the 3rd year why he did this. He replied: "I can do it faster and better myself." My chief's reply? "And I can do a gallbladder faster and better than you can." Case closed. I got to check wounds and write notes from then on; my experience on the rotation improved dramatically.

This experience has informed my understanding of "delegation" ever since - including the core truths that delegation is a key element of career development (both yours and people you work with) and workplace engagement.   People to whom work is correctly delegated learn more, feel more empowered, and want to do even more. And so while delegation does have potential pitfalls, with preparation these can usually be avoided – and you will have more time to do the work that only you can do.

What kinds of things should you delegate? Consider delegating *any* task or project on your work list *if you have* someone qualified to do it, and you are not expected to do it completely by yourself (writing your dissertation comes to mind!).   Remember that the goal is the product, not the process. Obvious candidates are activities which are already part of someone else's job description (filing, copying, faxing) or tasks that need to be done repeatedly using a protocol or checklist (travel reservations; electronic submission of a manuscript). More complex tasks should also be considered: a draft budget for your grant, a draft manuscript or progress report, a new procedure for dealing with a problem that has arisen – these will require final revision and approval on your part, but by delegating the early drafts you will save yourself time, get ideas you might not have thought of, and, you will promote the development of your colleagues - -which leads to increased capacity for the entire organization. A "win – win –win"!.

The objections

 "I don't have anyone to delegate to." You may not have your own secretary, or even one to share. But once you think of delegation in broad terms, you may have options. At home, your partner/spouse, children, the 15 year old down the street (mowing the lawn), the neighborhood laundry staff, the personal chef who will make your meals once a week, the parents in your child's scout troop, -- and so on. At work, a secretary / assistant, departmental or laboratory administrator, resident /fellow /medical student, staff member, graduate assistant, research assistant, colleague (!), or medical editor.   Complex drafts are also candidates for delegation: to a graduate student, a draft of a manuscript; or to a project administrator, a draft budget, or reorganization plan.

"I can do it faster /better myself."
The underlying dynamics here vary: it may be that you *can do* aster, but does it the task really need to be done fast? If the task is a one time thing, and it really would take more time to explain than to do – go ahead. But if it is a repetitive task, the time for explanation is well spent. The other dynamic is the dreaded *perfectionism.* If this is your tendency, recognize it, and ask "does this really need to be done perfectly."

"I don't want to bother him/her with this small task when I can do it myself." Each person in the workplace has a job description, and the organization expects that relevant tasks will be performed. The vast majority of employees look at it the same way. Personal secretaries, for example, not only expect to be asked to copy, file, answer the phone, and arrange meetings, but they take pride in contributing to the mission of the unit by doing these things well. It is not a bother to ask. It *is* an inappropriate use of a high priced employed for you to do these things yourself without a good rationale (which there sometime will be). You don't have to apologize for asking people to do tasks within the scope of their job.

Delegation basics

The three fundamental decisions you must make before you delegate are to decide what you want done, who is qualified to do it, and how much oversight will be required from you.

 What do you want done?

Use the same approach you should use for your own projects, by beginning with a concise but complete statement of the outcome you desire. Include a description of the "deliverable" (e.g. "draft fiscal year budget in Excel spreadsheet) and the timeframe ("…by next Tuesday).

For anything complex, and ideally for nearly every delegated task, you should create a written request, that includes the outcome description. This documentation will help the person to whom you have delegated stay on task, and will facilitate follow up and oversight by you. Options include sending the task by email;

What you should avoid – except in selective cases -- is prescriptive advice about HOW to achieve the outcome. You should allow your delegate to do the job the way they want, as long as the desired outcome is achieved, and on time. Why? More is learned, confidence increases, *and* you don't actually know the best way to do everything!

The main exceptions to this "no micro-managing" rule are when the "delegate" is brand new to the work activity, especially if the task or project is complex / or an efficient method has been previously identified. In fact, your staff should be encouraged to develop protocols and checklists for frequently performed duties, so that the knowledge of how these are done can be efficiently passed on to others.

To whom should you delegate this task?

To make a good choice, match the task to the person using these criteria: the individual's job description, skills, experience with the specific task, learning / developmental needs, and the level of trust you have with person.

How much oversight is required?

To answer this question, you have to determine the skills and experience of the person to whom you are going to delegate. The rule is obvious: less experience / skill requires more oversight and *vice versa*. The only trick is to be sure you are assessing experience with the actual type of assignment you are making – and not just general experience. Someone with 20 years on the job may still need close oversight if the assignment is new to them.

Follow up options

The frequency of follow up depends on the task and the person who is doing it. The more complex the task, or the more inexperienced the person, the more formal follow up will be needed.

Set expectations for follow up from the start. Suggest a schedule and method of communication, and ask for input. For example: "John, I'd like to check with you on your progress on this draft report once a week. How about if I send you an email every Friday morning as a reminder to send me the current draft. Will that work for you?" or, Jane, let's meet once a month to discuss your progress. I'll have a recurrent meeting put on our calendars – or would you rather schedule with me separately each month?"

If you delegate a large number of small tasks to one person, you might want to meet with him/her regularly (daily, every other day, weekly) to go over the whole list at once.

Keep a written record of all delegate tasks, regardless of the follow up plan. The following options are easy to implement -- and are not mutually exclusive:

1. Create a folder for each person to whom you regularly delegate, and store notes for delegated tasks, as well as other matters you may need to discuss. Store the folder in an easy to access location: a drawer in your desk, or a desk top standing file so that you can easily add notes without getting out of your chair. Store the set of delegates' folders in the same place, and in alphabetical order to facilitate rapid retrieval.

2. Keep a written or electronic list of each delegated project in the same system you use for your own project list. For example, within my own project list I have two categories: projects for which I am personally taking the lead (called "My Projects"), and projects I have responsibility for, but have delegated the lead to others ("called "Delegated Projects"). I sub-organize the delegated project list by name, so John, Janice, Jim, and Jana each have a subcategory listing their individual projects. That way, when I meet with Janice, I can go to her list and easily review the status of each project.

3. Create a "waiting for" designation in your email program. The method will depend on your program. Use this designation to monitor emails you have sent to others for which you require a reply – in other words, replies that you are "waiting for." In Outlook, Lotus Notes, GroupWise and many other programs, you can create a folder named "Waiting For," and store these emails there. In Gmail or Outlook you can create a label or category, respectively named "waiting for," and apply to the emails in question. Emails you have sent for the purpose of delegating tasks and projects can be included in this system. In most email programs you can also set a reminder to the email so that you do not need to worry about missing a follow up deadline.

If you have a secretary / assistant

The approach outlined works whether you have an assistant of your own or share one with a group of people; the difference will be the range of things you can delegate, and the amount of that person's effort that can be devoted to your work..

- Aim to establish a good working relationship. This may be obvious, but it is an oft-violated rule. Treating your colleagues badly is a prescription for career failure.

- Determine the job description for assistants at your institution / unit (by policy or practice) so that you know what kind of tasks and projects are acceptable. This information may be available in writing from your unit, but in all cases check with senior members of your workgroup to determine actual practice.

- Once you know the lay of the land, discuss with your assistant the types of tasks that you plan to assign, and describe how you like to have these done. A common set of secretarial tasks includes: answering the

phone, opening and sorting mail, filling, scheduling meetings and conference calls, making professional trip arrangements, and processing expense reports. You know how you like to have each of these done, so be clear; if you are new to having a secretary, ask him/her for options.

- Observe professional boundaries. Do not ask your secretary to perform personal tasks, and do not share or solicit inappropriate personal information.

- Describe your preferred methods of communication. For example, when a phone message is taken, should you be e-mailed, paged, or phoned; or should the assistant record the message on a pink note, and tape to the frame of your door (which I hate!). Do you prefer to receive most information and requests by email, or do you prefer to meet and talk?

- Share your organizational system and expectations as to how the assistant should work with it. Find out what system he/she uses, and figure out who you can work with that. If you don't feel particularly well organized, ask for advice! I have talked to many highly organized assistants who are dying to share tips with their boss, if only they would ask.

- Keep in regular contact: personal secretary who runs your work life: daily meeting; share with 2-3 others: weekly or biweekly meeting; share with a large group - ad hoc, but check in a few times a month.

- Once you have a sense of your assistant's level of skill, start to think about making "developmental" assignments -- tasks and projects that are new, or more complex, that will lead to professional growth, and ultimately higher job satisfaction and engagement. Simple examples are asking your secretary to draft responses to letters, or to propose a method for a new project – subject, of course, to your editing and revision.