



Finance Skills Development

## Top tips - Increasing productivity through delegation



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## Delegation

Delegation is the life-blood of the modern organisation. If one person has to make all the decisions, the organisation will be constrained by the amount of time that person can be present. Only by enabling other people to make (some of) the decisions can more decision making time be made available. Thus managers who refuse to delegate prevent the growth of their organisation and probably make themselves unpromotable from their current position.

Effective delegation is about giving responsibility for the achievement of tasks to qualified, experienced and confident staff. The manager can never pass on total responsibility as she or he remains responsible for

the success of the delegation. Effective delegation therefore implies effective training, supportive management and the management of errors in a way that encourages staff to grow in their roles.

Poor delegation is frequently practised whereby a staff member is told to do something but given no training or support. This creates the negative cycle of abdication. Managers must choose when to delegate and who to delegate to. It is not too far from the truth to say that the manager's job is to create and develop people who are ready to receive delegation.

## The 5 major reasons that stop managers delegating

1. No Time – I have no time to teach a team member the tasks.
2. It takes too long
3. I can do it quicker myself
4. I tried in the past and it failed
5. I will lose control
6. I don't trust my staff to deliver

To figure out how to delegate properly, it's important to understand why people avoid it. Quite simply, people don't delegate because it takes a lot of up-front effort.

## When to Delegate?

Delegation is a win-win when done appropriately, however that does not mean that you can delegate just anything. To determine when delegation is most appropriate there are five key questions you need to ask yourself:

1. Is there someone else who has (or can be given) the necessary information or expertise to complete the task? Essentially is this a task that someone else can do, or is it critical that you do it yourself?
2. Does the task provide an opportunity to grow and develop another person's skills?
3. Is this a task that will recur, in a similar form, in the future?
4. Do you have enough time to delegate the job effectively? Time must be available for adequate training, for questions and answers, for opportunities to check progress and for rework if that is necessary.
5. Is this a task that I should delegate? Tasks critical for long-term success (for example, recruiting the right people for your team) genuinely do need your attention.

If you can answer "yes" to at least some of the above questions, then it could well be worth delegating this job.

## Who should we delegate to?

3 major factors to consider are:

1. The experience, knowledge and skills of the individual as they apply to the delegated task.
  - What knowledge, skills and attitude does the person already have?
  - Do you have time and resources to provide any training needed?
2. The individual's preferred work style.
  - How independent is the person?
  - What does he or she want from his or her job?
  - What are his or her long-term goals and interest, and how do these align with the work proposed?
3. The current workload of this person.
  - Does the person have time to take on more work?
  - Will you delegating this task require reshuffling of other responsibilities and workloads?

When you first start to delegate to someone, you may notice that he or she takes longer than you do to complete tasks. This is because you are an expert in the field and the person you have delegated to is still learning. Be patient; if you have chosen the right person to delegate to, and you are delegating correctly, you will find that he or she quickly becomes competent and reliable.

## Principles of Effective Delegation

For the delegation to be successful we need to ensure the following principles are adhered to. When things have gone wrong with the process one or more of these elements are usually missing.



## 9 essential steps of successful delegation

### 1. Define the results expected

Confirm in your own mind that the task is suitable to be delegated. Does it meet the criteria for delegating?

### 2. Select the individual or team

What are your reasons for delegating to this person or team? What are they going to get out of it? What are you going to get out of it?

### 3. Assess ability and training needs

Is the other person or people capable of doing the task? Do they understand what needs to be done? If not, you can't delegate.

### 4. Explain and sell the reasons

You must explain why the job or responsibility is being delegated and why to that person or people. What is its importance and relevance? Where does it fit in the overall scheme of things?

### 5. State required results

What must be achieved? Clarify understanding by getting feedback from the other person. How will the task be measured? Make sure they know how you intend to decide that the job is being successfully done. Explain the rules, limitations and performance standards.

### 6. Ask them to come up with their own plan of action and the resources required

Ask them for their own plan of action. Discuss and agree what is required to get the job done. Consider people, location, premises, equipment, money, materials etc.

### 7. Agree their plan including resources required and deadlines

When must the job be finished? Or if an ongoing duty, when are the review dates? When are the reports due? And if the task is complex and has parts or stages, what are the priorities? At this point you may need to confirm understanding with the other person of the previous points, getting ideas and interpretation. As well as showing you that the job can be done, this helps to reinforce commitment. Methods of checking and controlling must be agreed with the other person. Failing to agree this in advance will cause this monitoring to seem like interference or lack of trust.

### 8. Support and communicate

Think about who else needs to know what's going on, and inform them. Involve the other person in considering this so they can see beyond the issue at hand. Do not leave the person to inform your own peers of their new responsibility. Inform your own boss if the task is important and of sufficient profile.

### 9. Feedback on results

It is essential to let the person know how they are doing, and whether they have achieved their aims. If not, you must review with them why things did not go to plan, and deal with the problems. You must absorb the consequences of failure, and pass on the credit for success.

This document has been written by Leadership and Management specialists Performance Development Group in conjunction with NHS Finance Skills Development.

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