



Delegation Checklist



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Delegation. It is the key to growth for any business. It allows a manager or business owner the space to look for and take advantage of new opportunities, while allowing staff the opportunity to develop new capabilities.

So why do so many managers struggle to do it?



Firstly, business owners or managers are often very good at doing the task at hand they need to hand over, and are worried that the job won't be done to the high standard they expect of themselves.

Secondly, business owners or managers enjoy the task they are handing over, so they feel they will lose touch or even their sense of identity by delegating.

Thirdly, they feel it will take too much time. We've all heard the phrase, "It's easier if I do it myself!"

The delegation process is important to both parties - the delegator and the delegate. We've developed this ten step checklist to help overcome hesitations and help ensure that the delegation process leads to a win-win for both the delegator (person doing the delegation) and the delegate (person being delegated to):





1. Define the Task

Ask yourself; would a ten year old be able to understand this? Make the tasks and expectations as clear and straightforward as possible.

2. Assess Their Development Level

What parts of this task has the delegate demonstrated they can do independently? What previous experience and skills does the delegate bring that can help with this task or help the way it is delegated?

3. Paint a Picture of What 'Good' Looks Like

This needs to be a non-abstract picture! How and what will you be using to measure whether the job is done well or not? It is important that the delegator challenges themselves to think hard about what is considered a 'good' standard.

4. Communicate Structure

This is like setting the tramlines for the task. What order should the tasks be performed and which aspects of the task need to be approved or checked before progressing? This is especially important if more than one task is involved.

5. Define Timelines

What milestones or progress points need to be established in order to give both parties confidence the task isn't being derailed? This gives the opportunity for the delegator and delegate to celebrate progress along the way. (See, delegation can be fun!)

6. Define How Often You Check In on the Task

At what times should the delegate escalate a potential issue? How should exceptions be handled? Having regular check-ins scheduled will help avoid a delegator feeling they have to 'micromanage' the task.

7. Schedule Check Ins

Write them down in a calendar or diary that both parties have access to. What specific points need to be addressed at these check-ins? This will bring a sense of certainty and clarity to what is expected at check-ins, and helps ensure that they run on time and on purpose.



8. Monitor Progress and Manage Exceptions

How do we monitor progress and manage deviations? Outline who needs to be notified if hurdles come up. This provides opportunities for feedback to promote wins and learnings.

9. Debrief

The military has a process they call After Action Reviews (AARs) where they ask questions like, "What worked and what didn't? What could have helped throughout the process, and what did we learn for next time?" Learning from errors and stumbles along the way are often more important than the achievement of success.

10. What's Next?

Did the delegation process highlight any holes in the task that need addressing? Does the delegate need further training? Can you reduce the number of check ins required? What are the other opportunities for delegation?



Incomplete or confusing handovers are often the cause of frustration, distress and incomplete or substandard work. Was one or more of these steps missing in your workplace delegation process? Try asking these questions next time and you'll be sure to experience a smoother and stress-free handover of tasks!

At Shape HR we help implement processes like these, as well as perform leadership training, group workshops and HR solutions for businesses of all shapes and sizes. Contact us today to discuss what we can do for your business:

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