

How to delegate

1. Preparation:

- a. Review/prioritise your tasks
- b. Make sure you understand the task yourself
- c. Is it appropriate for you to do?
- d. If no, who is best suited for the task?
- e. Do *they* have capacity?

2. Initial briefing: A SMART objective

- a. Expectations - a clear task, a solution, a body of research
- b. Establish timeframe and deadline (or deadlines if large task)
- c. Check they have understood - back up with written confirmation/instruction if appropriate
- d. Check they have accepted the task (a clear 'yes', 'no' or counter-offer)
- e. Establish structure for reporting back with clear reporting back points
- f. Delegatee reaffirms objectives, deadlines and check points to delegator
- g. Make your availability clear and request they ask you if they have any doubts or problems - in good time!
- h. Ask them if they have any immediate questions

3. Step 2: the process:

- a. Delegatee leads the process
- b. Delegator remains available
- c. Reporting back stages:
 - i. Delegatee briefs delegator on progress
 - ii. Discuss any problems/changes
 - iii. Re-delegate any amendments
 - iv. Recreate expectations, structure and timeframe if necessary
- d. Delegator remains in background between stages

4. Step 3: final report:

- a. Delegatee reports back vs initial brief
- b. Work given final check
- c. Reminders set up to follow up task if appropriate
- d. Feedback given both ways
- e. Discuss points arising and any lessons for the future

We hope you have found this material useful. If you have any questions on how to use it, we'd be happy to talk you through it.

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