The 7 Step Delegation Process

Use the following summary of the seven stage delegation process to check out your own approach to delegation. The time you invest in each stage will depend on the magnitude, importance and complexity of the task; how well you know and trust the delegatee; and the amount of time and resources available.

1. **ANALYSIS**
   - Review your own tasks and responsibilities periodically
   - Assess the primary function and objectives of your job/the department
   - Examine your workload and select out the tasks that only you can do
   - Take decisions about what to delegate

2. **PLANNING**
   - Make time to plan the delegation process thoroughly
   - Set reasonable timescales and realistic standards of performance that you expect
   - Identify what skills and resources you require

3. **IDENTIFYING THE RIGHT PERSON**
   - Select someone who has the required skills
   - Consider who will find this a challenge
   - Consider who will benefit most from the development opportunity
   - Consider who has the time

4. **RESPONSIBILITY AND AUTHORITY**
   - Establish how much authority and autonomy the person will have
   - Agree areas where decisions can be taken or not taken without consultation
   - If money is involved, consider the limits
   - Decide to whom they will report about what

5. **MAKING THE DELEGATION – BRIEFING**
   - Describe the task fully and clearly
   - Agree timescales and standards of performance
   - Agree resources, training or extra help needed
   - Define budget limits and other parameters
   - Agree process for feedback and review
   - Agree authority limits
   - Inform others about who is in charge

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6. **PROGRESS REVIEWING**
- Make review meetings positive and motivating
- Only intervene if a crisis is looming
- Maintain a discreet oversight of how things are going
- Review and if necessary revise plans

7. **COMPLETION APPRAISAL**
- If the task was completed satisfactorily be generous with praise and or reward
- If things went very wrong, identify weaknesses and discuss how they may have done things differently. Use it as a learning exercise
- Praise in public but always discuss errors in private

**Would you or others in your team benefit from training in effective delegation?**

We hope that you'll find these tips useful. However, most people derive huge additional benefit from the interaction, practical exercises and valuable feedback that face-to-face training gives. H2 offers open Courses - held in Central London in convenient locations on a regular basis - a place costs from just £230 + VAT per person for a 1-day course, or £375 + VAT per person for a 2-day course. We currently offer the following open courses in relation to this topic:

- Effective Delegation (1-day course)
- Management and Supervision Skills (2-day course)

We also offer bespoke/in-house training from just £62 + VAT per person per day.

Here’s what some satisfied customers said after attending our training in delegation/management & supervision skills:

"Thanks so much, the most useful part of the course was being able to apply the process to our own practices."

“An engaging and valuable session - the adaptability of the trainer and the content were excellent.”

“I am looking forward to getting back to work and to putting some of the many useful tips into practice straight away.”

**Contact H2 Training & Consultancy:** Freephone: 0800 0015 151 or Email: h2@h2training.com