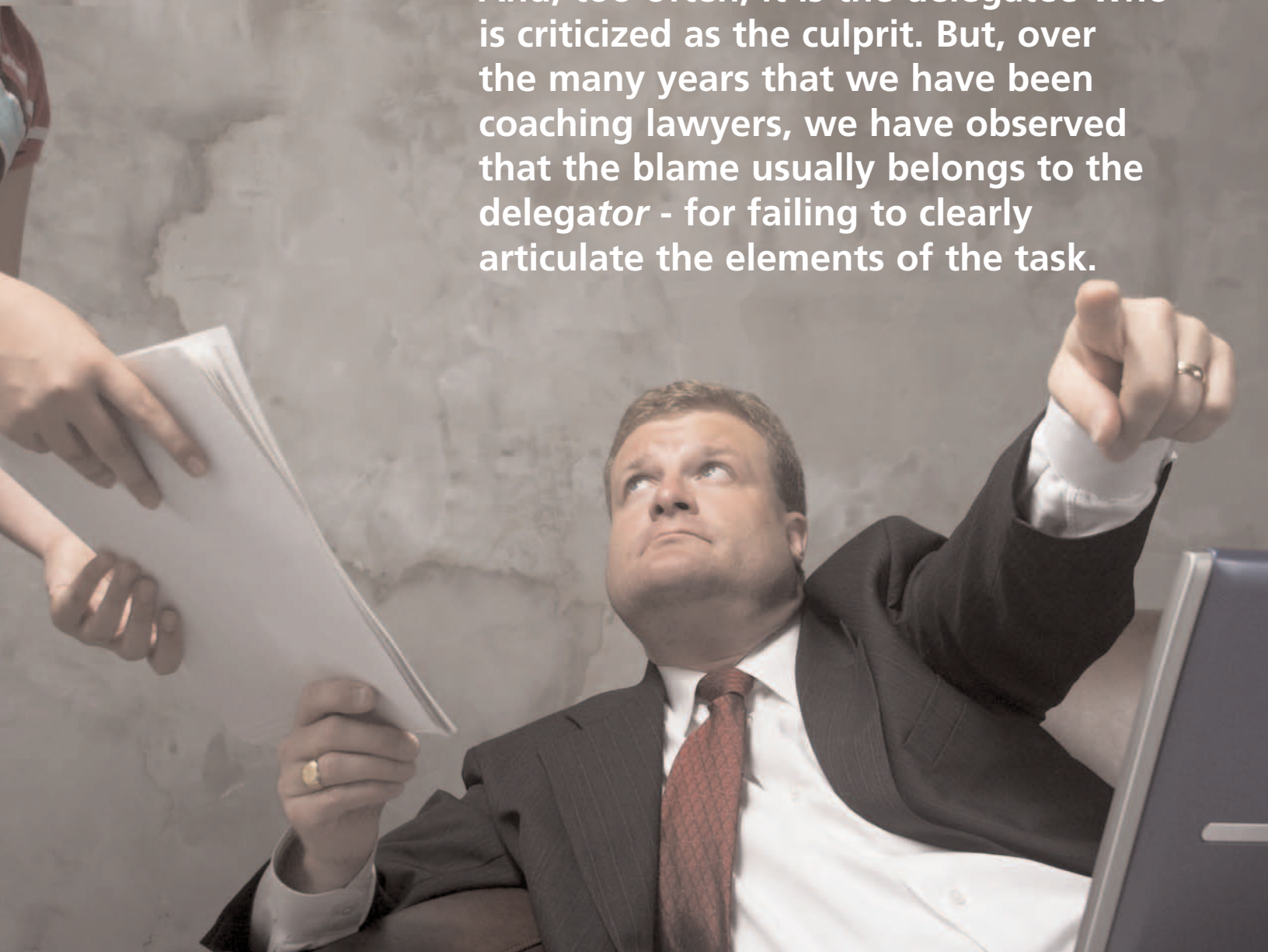


The Elements

by Lawrence M. Kohn and Jill Kohn, PhD

Sometimes delegation is a disaster. And, too often, it is the delegatee who is criticized as the culprit. But, over the many years that we have been coaching lawyers, we have observed that the blame usually belongs to the delegator - for failing to clearly articulate the elements of the task.



of Effective Delegation

So, we created a form we call the Task Manager® (see page 29), which includes the key elements of effective delegation. The form provides a structure that opens the door to discussing each element. By using the form, you will develop the habit of remembering the key elements each time you delegate. The form does not need to be completed in writing for every delegation, however, every delegated task should include all of the elements.

While using the form will take additional time at the beginning of a task, it will undoubtedly save much more time in the execution. Inadequate information causes errors and errors waste time. Also, if a delegatee is unclear about an issue during execution, the time required to reconnect with the delegator for clarification may be substantial.

Following is a description of each of the elements and some suggestions regarding effective implementation:

Name: The form could be used by the delegator as a way to plan delegation. And, it could be completed by the delegatee as a way to take notes and confirm her or his understanding of the assignment. If the form has the name of the delegator, it should be stored in the file dealing with the associated project. If the form has the name of the delegatee, the delegator should store it with all the open tasks of the delegatee. That way, the delegator can quickly review all the open tasks delegated to

that individual.

Date Received: By documenting the date that the task is received, everyone is clear about when responsibility has shifted to the delegatee. Without the date, it is easy to forget how much time has passed since the delegation was initiated. It is best to delegate a task at the first moment possible to maximize the time available to do the work, to review it, and to return it for corrections. Delegation at the inception of a project also creates a sense of ownership for delegates which may enhance their enthusiasm about the task.

Deadline:

Deadlines are difficult to meet if they are not clear. This line must always be completed with a specific date and time. It should never include

ASAP as an entry. That's because the lack of precision can only create confusion. To some, ASAP means drop everything and work overtime to get the task done. Without discussing a precise deadline, ASAP could appear to mean, "As soon as practical", or worse, "After significant avoidance & procrastination".

The discussion about the deadline may take the form of a directive or it may be subject to negotiation. It is a good idea to discuss the factors that drive the decision-making process. It may be appropriate to challenge basic assumptions about timing. It may also be appropriate to initiate conversations with those who are relying on the delegatee for other tasks. These conversations have the

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risk of becoming frustrating, so everyone must try to be patient and respectful.

When deciding the deadline, both parties should consider the other commitments of the delegatee, time required to do the work, time for the delegator to review it, and time for subsequent improvements. If at all possible, the deadline should also allow for a cushion to

be considered a serious infraction. If a task is not completed on time, the delegator should immediately contact the delegatee and remind her or him that deadlines are commitments and failure to meet commitments without prior notice cannot be tolerated. Compliance with deadlines should be included as a factor in compensation and promotion.

This focus on compliance with deadlines may sound harsh, but it actually builds morale. A person's reputation as trustworthy may be their most important asset. And, this process teaches people how to be trustworthy. It also allows the delegator to feel confident that deadlines will be met. This dramatically reduces stress and allows the delegator to focus on other priorities.

In addition to building morale, teaching respect for deadlines is one of the easiest and most effective methods for improving productivity. When people consistently take deadlines to heart, they will give more attention to their commitments and not make unrealistic promises. Realistic commitments produce timely results.

Task Description: This is simply an opportunity to clearly state what the delegator wants. It should be brief.

It should be limited to a single task and not include details. If time permits, it is a good idea to discuss how the task fits within the context of a project. It is not necessary to document this information, but a discussion will enhance the delegatee's interest in the task. It may also improve her or his ability to execute.

Required Resources:

Every task needs resources. In addition to the time required, the delegatee may need support from others, equipment, supplies, etc. It is always important to discuss and document required resources in advance to make sure that all parties to the delegation are aware of what is needed. This will increase the likelihood of meeting deadlines.

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accommodate the unexpected.

It should be understood that the deadline is a commitment and not just an estimate. In the event that the delegatee feels a deadline is in jeopardy, she or he should notify the delegator *the moment the possibility of missing a deadline arises*. It is never acceptable to miss a deadline without providing the delegator with immediate notice when the deadline is at risk. Failure to comply should



TASK MANAGER

Name: _____

Date Received: _____ Deadline: (Date) _____ (Time) _____

Task Description: _____

Required Resources: _____

Loop List: _____

Quality Standards: _____

TIMELINE

Interim Steps	Deadline	Completed
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



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Loop List: One of the most frequent weaknesses in delegation is failure to keep people in the loop. Stakeholders in a task can provide valuable input and enhance implementation. The loop list is a reminder to keep stakeholders informed.

Quality Standards: Effective delegation requires that the delegator has a clear vision of the outcome of a task. For example, a delegator who is requesting some research needs to give the delegatee direction about how comprehensive the results should be. Does the delegator want a list of bullet points, a one-page summary, or volumes of information? The Task Manager® reminds the delegator to spend some time considering the details of the desired outcome.

The amount of detail discussed will vary with every delegation. Tasks familiar to the delegatee may need

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little additional detail. New tasks will need more.

One obstacle a delegator may encounter is a lack of awareness of how much detail the delegatee needs. The best way to find out is to ask. Another approach is to request that the delegatee initiate the completion of the quality standards section. The response will guide the level of clarification. Of course, the delegatee should always feel comfortable requesting more detail or notifying the delegator that the amount of detail being provided is excessive. The delegatee must always remember that if the delegator provides too much detail, the intent is not to communicate a lack of confidence, but rather is intended to be thorough.

A common complaint of delegators is that the delegatee is being paid enough to warrant not having to go into great detail regarding some tasks. While this entitlement may be justified, the delegator must still provide the detail or the task is at risk. As with discussing deadlines, these conversations can be frustrating, so everyone should always maintain patience and respect.

After discussing the quality standards, it is a good idea for the delegator to ask, "What are your questions?" This is a better approach than asking, "Do you have any questions?" That's because delegates may be embarrassed to ask questions and leave the discussion prematurely.

A great way to avoid having to duplicate discussions

about quality standards is to create a check list. The delegator can create the list or can delegate its creation. As new quality standards arise, they can be added to the list. Of course, filing the checklists so they can be retrieved for future use is a requirement.

Timeline: This is a list of interim steps, their deadlines, and dates of completion. When interim steps are discussed and documented, it is often the case that the original deadline will have to be reconsidered. Once the task commences, the interim tasks should be monitored frequently to make sure the process is under control.

With all tasks, there should be an understanding that if the delegator omits any of the key elements, the delegatee is obligated to ask for the information. When all the elements are discussed and documented, both delegatee and delegator should keep a copy of the Task

Manager®. Both should also agree on reporting systems (voice-mail, e-mail, meetings) for communicating that the interim deadlines are being met.

Poorly executed, delegation will frustrate clients, lawyers, and staff.

But when it fails, don't automatically blame the delegatee. Rather, make sure the delegator is clear about - and that both parties discuss and document - the key elements of the task. When that happens, delegation can produce greater productivity, increased client satisfaction, a teaching environment in the firm, and more time for the delegator to bring in even more delegable clients.

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