

# 10 STEPS TO SUCCESSFUL DELEGATION

Delegation is a challenge many business leaders grapple with. Common reasons I hear include, “It’s just quicker and easier to do it myself,” “I know exactly how I want it done,” or “My team are too busy or lack the necessary skills.”

Successful leaders understand that delegation is crucial for achieving long-term success. But do you know how to delegate effectively, rather than simply offloading tasks onto your team?

This 10-step approach serves as a practical guide to help you delegate with confidence and achieve better results.

## 1. Prepare & invite the recipient



“I have something important that I need your assistance with. Please can we step into my office / meeting room to discuss this?” or “Can we sit down at [time] to discuss this in [office or meeting room space]?”

## 2. Appropriate space



Move to the agreed office or meeting room and sit with them. (Delegating at a desk or informally will not give your delegation the appropriate gravitas) Make sure they have a notebook or some way of making notes

## 3. Give them a headline



“What I need your help with is ....” Just a brief headline so that they get an idea what it is you need them to do

## 4. Provide the background and context



Provide any background information, supporting documents, messages etc.

## 5. Tell them what you need them to do



“What I would like you to do is....”  
“I suggest you look at....”  
“What I am expecting the result to be is....”

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## 6. Be clear on the deadline



“This needs to be achieved or back with me by no later than [date / time]” “The reason for this deadline is....”

Do not delegate too late and set the recipient up to fail!

## 7. Tell them why it is important



“The reason that this is so important is....”

“It will make a difference to our (customer / team / performance...)”

## 8. Ask them to confirm their understanding



Ask them to tell you back 3-7 above, clarifying any points they have not fully understood.

## 9. Ask what assistance they need to be successful



“What help or resources do you need to achieve this?”

“Do you have any issues with conflicting deadlines that I can help you with?”

## 10. Thanks / Close



“Thank you for your assistance with this, It really is important and I am confident that you will use this as an opportunity to demonstrate your abilities”

“Let me know if you run into any difficulties”

## Follow up & Results:

Check in with the person you delegated to from time to time but do not micro-manage, and allow them to shine. Most importantly, provide thanks and recognition for successful achievement.

If having followed this process things still don't go well, ask yourself what more you could have done to create success, rather than allowing yourself to consider it proof that delegation does not work. Delegation does work when done well!