



Delegation Training

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Agenda

- **Barriers to Delegating**
- **What is Delegation**
- **Four Pillars of Delegation**
- **12-Step Program to Delegation**
- **Practice Exercise**
- **Managing Risks**
- **Benefits**



Barriers to Delegating

- **It takes too long to explain**
 - Only the first time
- **It is easier and quicker to do it myself**
 - You may be worried about your own hours/utilization
- **If you want it done right, you better do it yourself**
 - If the task isn't done right, you are still accountable
- **My employees resist responsibility**
 - You are the manager; Take ownership.
- **My employees lack experience and competence**
 - And will continue to unless you start delegating

Barriers to Delegating

- **No one on my staff can do what I do**
 - If they could, would we still need you?
- **My employees won't like me if I expect too much of them**
 - Don't confuse 'like' and respect
- **I can do it better than anyone else**
 - You are probably comfortable doing the job you've been doing. But now we need you to concentrate on the responsibilities of your new job and get comfortable with those.
- **My people are already overworked. I can't overload them.**
 - Have you taught them how to delegate?



PASSING THE BUCK

US Politicians have been perfecting it since 1776

What is Delegation?

- **Delegation is not task assignment.**

- **Task assignment:** assigning work within the duties and responsibilities of the employee.

- **Delegation:** assigning the responsibility and authority to do work that is normally part of the manager's job.

- **Delegation is not “dumping.”**

- **Not a way to avoid unpleasant assignments.**

- **Creates resentment.**

- **Delegation is not abdication.**

- **Ultimate accountability rests with the manager.**

- **Establish appropriate controls and checkpoints to monitor progress.**

What is Delegation?

▪ Responsibility

- Clear expectations
- Tell them **WHAT** to accomplish not **HOW** to accomplish it.

▪ Authority

- Power to act and make decisions
- Identify boundaries and budgets

▪ Accountability

- Manager holds employee accountable for actions and decisions.
- Manager is held accountable by partners and clients.
- True for both penalties and rewards.

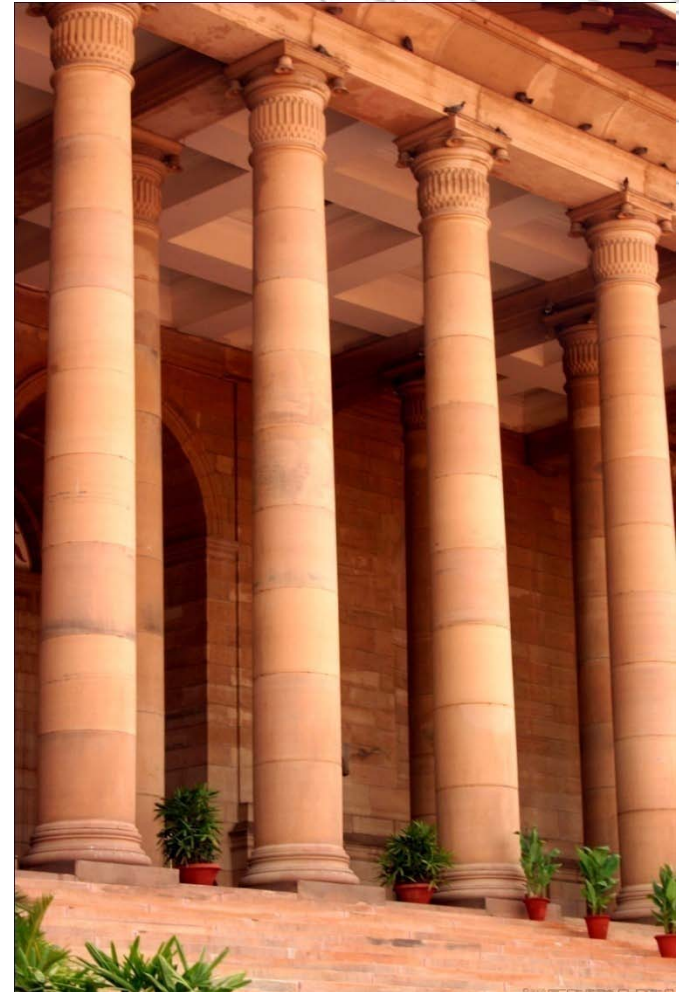
**YOU HAVE TO DELEGATE
SOME AUTHORITY!**



The Four Pillars of Delegation

I. Willingness

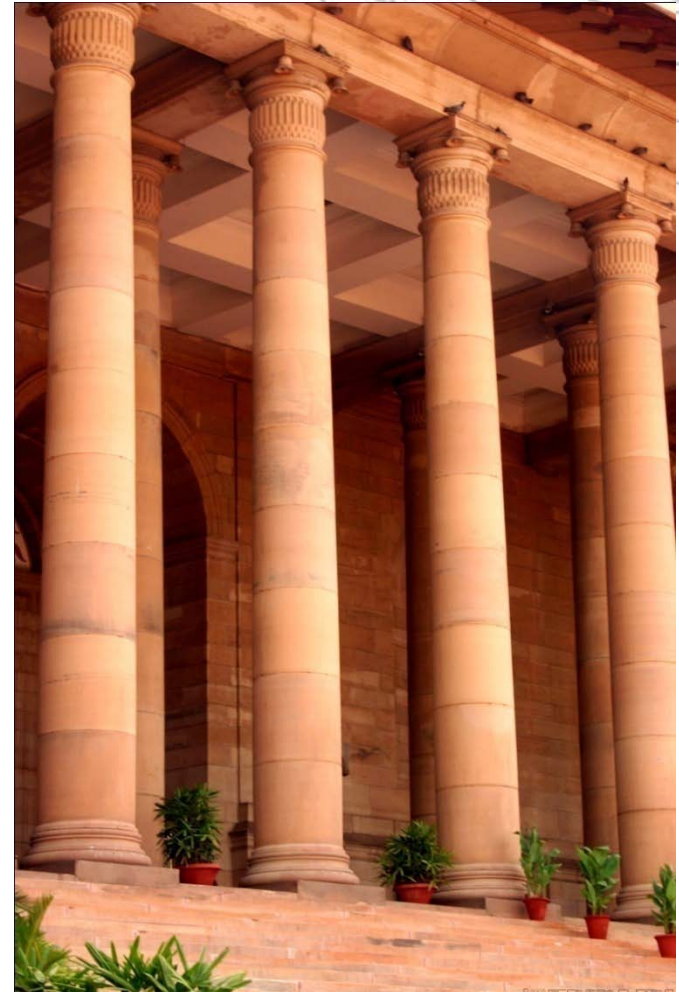
- **Delegatee**
 - Anticipation
 - Proactive Engagement
- **Delegator**
 - Refocus
 - Look ahead
- **Avoid:**
 - Unnecessary changes
 - Needless intervention



The Four Pillars of Delegation

II. Clear Direction

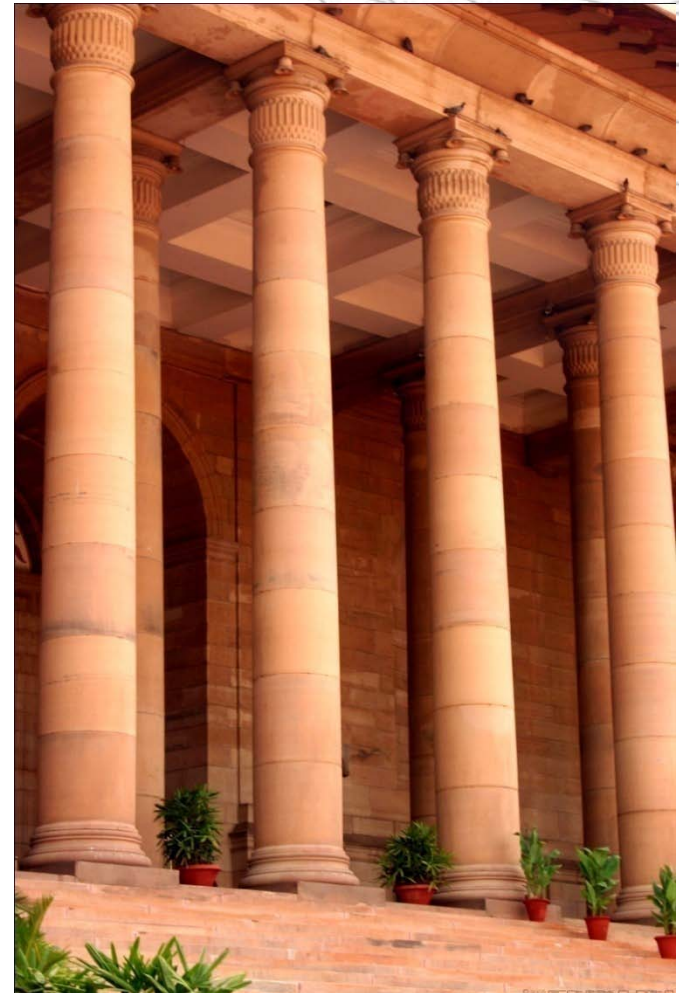
- **Communicate the Outcome**
 - Schedule
 - Measurable Results
- **Prioritize**
 - Be realistic
 - Collaborate
- **Avoid:**
 - Being vague
 - Claiming all the credit
 - Denying knowledge



The Four Pillars of Delegation

III. Authority = Responsibility

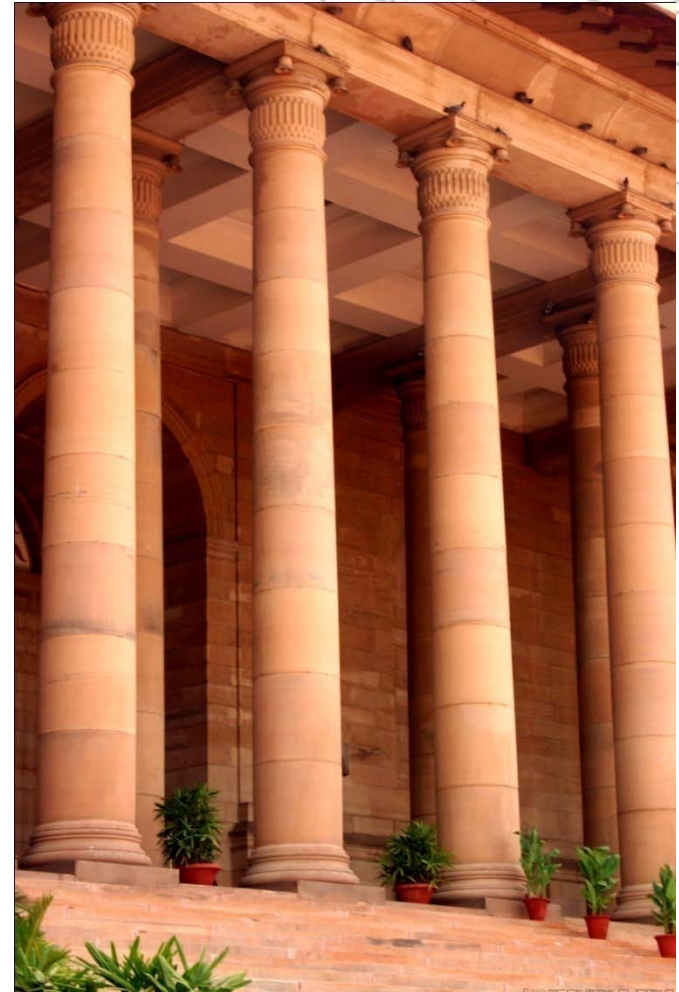
- **Assess Capabilities**
 - Questions to client
 - Questions from client
 - Meetings with client
- **Assign Responsibility**
 - Set clear limits
 - Define accountability
 - Grant authority
- **Avoid:**
 - Distancing
 - Making all the decisions



The Four Pillars of Delegation

IV. Provide Resources

- **Based on Skill Set and Resourcefulness**
 - Time
 - Equipment
 - Supplies
 - Training
 - Budget
- **Avoid:**
 - Taking credit for good results while providing scarce resources



Stages of Delegation



Stage 1	Stage 2	Stage 3	Stage 4
Define Goals	Define Goals	Define Goals	Define Goals
Specify Results	Specify Results	Specify Results	Specify Results
Describe Task	Describe Task	Describe Task	Describe Task
Explain Method	Explain Method	Explain Method	Explain Method
Execute	Execute	Execute	Execute

Stages of Delegation



Stage 1	Stage 2	Stage 3	Stage 4
Define Goals	Define Goals	Define Goals	Define Goals
Specify Results	Specify Results	Specify Results	Specify Results
Describe the Task	Describe the Task	Describe the Task	Describe the Task
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ABANDONMENT

MICROMANAGEMENT

12-Step Program to Delegation

1.) Admit You Have a Problem

- **Deadlines are frequently missed**
- **I seem much busier than my co-workers**
- **I frequently work late, take work home, or work while on vacation**
- **My staff seem frustrated and bored**
- **I'm frequently too busy to talk to employees**
- **I have no time to train my staff**
- **I don't have time to address my staff's needs and suggestions**
- **Staff members express no desire to work with me**
- **I rarely or never visit my employees' work stations**
- **I insist that all incoming and outgoing communication must pass through me**

12-Step Program to Delegation

2.) Determine What to Delegate

- **Contemplate how to present the assignment**
- **Develop a written plan**
 - Requirements
 - Parameters
 - Authority level
 - Checkpoints
 - Expectations

12-Step Program to Delegation

3.) Choose the Right Person

- **Assess the necessary skills and experience**
- **Consider stretching an employee who doesn't already have the necessary skills and experience**
- **Don't always choose the same 'go-to' person**

12-Step Program to Delegation

4.) Give an Overview

- **Define goals**
- **Specify results**
- **Establish timing**

12-Step Program to Delegation

5.) If Necessary, Get Specific

- Describe the tasks
- Explain the method
- Set performance standards
- Identify resources
- Confirm understanding of authority

12-Step Program to Delegation

6.) Solicit Questions and Feedback

7.) Confirm Understanding

- Have them restate the goals and results

8.) Obtain “Buy-In”

- Show the benefits, “What’s in it for you”

- Relieve pressure



12-Step Program to Delegation

9.) Be encouraging

- Express confidence
- Reassure
- Show empathy

10.) Establish Checkpoints

- Collaborate
- Strive for mutual agreement

12-Step Program to Delegation

11.) Stick to the Agreement

- Monitor progress without hovering
- Let go without abandoning
- Hold accountable

12.) Completion

- Accountability means consequences
- Recognition and reward



Delegation Exercise

- 1. Identify task to be assigned**
- 2. Identify a target staff member, stage level**
- 3. Discuss potential obstacles**
- 4. Outline goals, results, tasks, method as appropriate**
- 5. How will you confirm understanding?**
- 6. How will you obtain buy-in?**
- 7. How will you monitor?**

Managing the Risks of Delegating

Risk of Failure

- Repeated failure hinders growth
- Provide more frequent checkpoints
- Increase responsibility gradually
- Become more familiar with the staff
- Mitigate potential risks

Firm Exposure

- Client miscommunication
- Bad advice

Benefits of Delegating

To the Manager

- **Reduces stress**
- **Frees you to do what you should be doing**
- **Develops trust and rapport with your employees**
- **Grooms your successor so that you can move on to bigger and better things.**

Benefits of Delegating

To the Employee

- **Provides professional growth opportunities**
- **Develops professional knowledge and skills**
- **Elevates self-image and self-esteem**
- **Brings personal satisfaction and a sense of achievement**
- **Enhances confidence and job security**
- **Involvement in decision-making increases commitment and morale**

Benefits of Delegating

To the Firm

- **Builds skill sets**
- **Promotes teamwork**
- **Enhances reputation**
- **Leverage Increases productivity and efficiency**

“Surround yourself with the best people you can find, delegate authority, and don't interfere as long as the policy you've decided upon is being carried out.” – Ronald Reagan



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