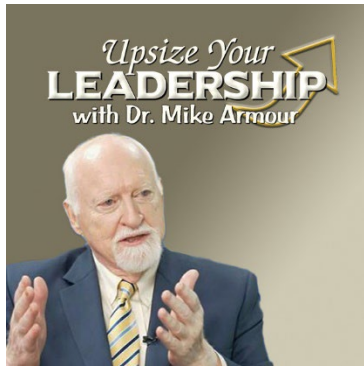


# Delegation Done Right

Hosted by Dr. Mike Armour

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If you are a manager, there is only one reason that you have your position: *to ensure the success of one or more vital functions of the organization.*

Moreover, you are a manager because the function entrusted to you is too large for one person to fulfill alone. Otherwise, you could fulfill your function as an individual contributor and would not need a team to manage.

So, since the function is too large for you to fulfill alone, success depends on your ability to leverage your energy and skills. And this leverage comes in the form of skillful delegation.

Today we will take up the theme of delegation and provide a checklist to follow in delegating well. Wherever you lead or manage, the next few minutes are sure to Upsize Your Leadership.

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I don't know of anyone who questions the importance of delegation in a high-performing organization. Yet all too often, we see it done poorly or not at all. And one reason that it's done poorly is that managers fail to take into consideration everything which they should address as part of the delegation. For the next few minutes, therefore, I want to provide a map for planning any delegation.

Before I do so, however, perhaps we should begin by defining the key term in today's discussion.

*Delegation is the process by which management at any level entrusts a portion of its authority and a sub-set of its duties to a lower level of the organization.*

This authority may be entrusted to an organizational unit, an individual, or a group of individuals (e.g., a task force or a work team).

Thus, delegation results in new tier of task responsibilities, a new set of duties for one or more parties at a lower level of the organization.

The concept of delegation is rooted in the idea that the party to whom we delegate has the right to act and speak on our behalf and to do so with a certain degree of independence. The very origins of the word “delegate” underscore this independence in speaking for another party. Let me tell you about that.

The ancient Romans had a powerful official who bore the Latin title *legatus*. That name is the root of our term “delegate” and related words such as “delegation.” The *legatus* was a spokesman for the Roman Senate. The Senate often dispatched him to some distant location to negotiate on their behalf or to announce demands which they were imposing on people beyond Rome’s borders.

Rome rose to power as the empire of Alexander the Great fell apart following his death. His empire divided into four separate kingdoms, each ruled by a successor to Alexander. Two of these kingdoms – one in Syria, the other in Egypt – became rivals for control of trade in the eastern Mediterranean.

Antiochus Epiphanes, who ruled from Syria, decided to extend his domain by seizing the throne in Egypt. He marched south with a huge army, to the alarm of the Roman Senate. The Senate had its own ambitions of someday bringing the eastern Mediterranean under the sway of Rome. Consolidated Greek power in that region did not serve their interests. So, they dispatched a *legatus* to meet Antiochus in the desert east of Egypt.

The two men stood face to face as the *legatus* announced that the Roman Senate was ordering Antiochus to withdraw. Antiochus, who was quite cunning, said, “I will go to my tent and think it over.” But the *legatus* immediately reached out with the staff which he carried as a symbol of his authority, jabbing the base of the staff into the sand and proceeding to draw a circle which enclosed both men.

He then announced, “If you step out of this circle before I have your agreement, you thereby declare war on Rome.” Antiochus reflected momentarily, then agreed to return home. Such was the power and the independence of the *legatus*.

I share this story because it so powerfully illustrates the combination of independence and authority which are at the heart of delegation. Delegation is a very serious matter, indeed. Every manager should want to do it well. And doing it well calls for proper preparation.

Let’s imagine, therefore, that you are preparing to delegate a duty (or a set of duties) to Susan, one of your direct reports. Here are eight factors to consider as you prepare to make that delegation.

First is your purpose for delegation. What is your primary reason for making this move?

- Is it to buy more time for yourself by removing one or more tasks from your calendar?

- Is it to take advantage of Susan's superior mastery of a topic on which you are not as well informed?
- Is it to provide a developmental experience for Susan?
- Is it to maintain a critical continuity during periods when you are traveling extensively?

Begin the delegation process by gaining clarity on your primary purpose (and any secondary purposes) for choosing to delegate this particular duty. This clarity of purpose will serve as a valuable point of reference for structuring the delegated duties and for choosing the way in which you approach the delegating conversation.

Second is level of independence. Good delegation calls for finding the right balance between guidance and autonomy. You find that balance point by asking questions like these;

- How much autonomy is Susan to have?
- Will she be free to act without guidance from you or from others whom you may designate?
- To what extent is she to carry out her delegated duty independent of regular input or sign-offs from you?
- How much do you want her to collaborate with others?
- And if you want her to collaborate, who specifically should she include in this collaboration?

Third is parity of authority and responsibility. To the degree that any amount of responsibility is transferred through delegation, there must be a commensurate transfer of authority. How much authority? That depends on the level of accountability which is levied on the party to whom you delegate the duty. *The amount of delegated authority must be sufficient to make the level of accountability realistic.*

Therefore, Susan must be given sufficient authority to perform the duty for which she is accepting immediate responsibility. And the scope of her authority should be clearly spelled out in the delegating conversation. On the other hand, she should not be given authority which exceeds what the duty demands.

The goal is to provide parity between her level of responsibility and her level of authority. If you are uncertain of this balance point, start off by providing slightly less authority than you think will be necessary and invite her to come back to you if she finds that her authority is insufficient. It is almost always less problematic to expand someone's authority when it is inadequate than to withdraw authority when it is excessive.

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Fourth are the parameters for making decisions. How much freedom should you give Susan in decision-making? You want to give her enough decision-making authority that she is not running back to you constantly to get approvals. On the other hand, you probably do not want to give her absolute freedom to make any decision whatsoever.

So how do you strike a proper balance? You strive to define guidelines and policies with sufficient detail that you can accept any decision which she makes within a reasonable interpretation of your guidance.

Fifth are exceptions. Are there any exceptions which you want to provide for in the general guidance and policies which you give Susan? For instance, you might want to make your own review of any correspondence that goes to a particularly testy or difficult customer. Or there may be certain communication on which you always want to be copied.

Sixth are personality factors. How does Susan like to work?

- Does she prefer detailed guidance up front on how to get the job done? Or does she prefer to be given general guidance and work out the details for herself?
- Does she function best in settings where she has lots of options? Or does she work better in situations which are highly structured and procedures-driven?
- Is she a good self-starter? Or does she require regular monitoring conversations to keep her on track?

These factors and others like them should always be weighed when determining whether a particular employee is a good match for a duty to be delegated.

Seventh are reporting and information cycles. How often do you want Susan to update you? And what reports do you want from her? How often? In what form? To the extent possible, avoid dropping these requirements on her after she is well underway in her new duties. Anticipate them in advance and discuss them as part of the delegation conversation.

Eighth are budget or resource constraints. If Susan is to have control of funding or other resources as part of her delegated duties, what limitations do you want to place on how she utilizes these tools? Again, it is far preferable to discuss these constraints at the outset rather than impose them after the fact in response to actions which she has taken and which fall outside of your preferences.

These eight considerations, then, constitute my checklist for preparing to delegate. By way of summary, let me list them all together.

- The purpose for the delegation
- Level of independence

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- Parity of authority and responsibility
  - Parameters for decision-making
  - Exceptions
  - Personality factors
  - Reporting and information cycles
  - Budget or resource constraints

Delegation done well leverages the skills and capabilities of your team. At the same time, it increases productivity and fosters the development of the most important resource of all, the people whom you lead.

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*Dr. Mike Armour is the managing principal of Strategic Leadership Development International, which he founded in Dallas in 2001. Learn more about his leadership development services at [www.LeaderPerfect.com](http://www.LeaderPerfect.com).*

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