Delegation and Decision-Making **Toolkit**



INDEX

Top Tips	3
INTRODUCTION	4
DELEGATION	5
I. Why Managers don't Delegate	5
2. Prioritisation and Delegation	6
3. How to Delegate	7
DECISION MAKING	10
I. Accountability	10
2. Whose Decision is it?	11
3. The Decision-Making Process Check List	11
4. Evidence Based Management: The Decision-Making Process	20
FURTHER READING	23
STEPS TO CREATIVE DELEGATION	24

TOP TIPS				
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Delegati	on			
	Consider when and what to delegate and who the best person to delegate is			
	Set clear goals and expectations and communicate clearly			
E F	Provide support and guidance along the way			
Decision	-Making			
E F	follow the steps of the decision-making process			
E	Ensure your decision-making is evidence based			
□ <i>i</i>	Assess your appetite for risk			
	Consider the stakeholders involved in making the decision			
	Gather the facts and keep an open mind			

INTRODUCTION

Effective delegation and decision making are two of the essential skills of management.

If used successfully delegation can enable you to manage your time more effectively by focusing your time and attention where is most needed, whilst developing the capability of your team.

Making good business decisions is a critical part of every manager's job and is vital to every organisation's well-being. However, many managers make important decisions without following a structured process or considering all of the elements that could impact on the outcome of the decision.

This guide will provide practical guidance on how to delegate effectively and improve your decision-making skills with the aim of increasing productivity, morale, and commitment, all of which will have a positive impact on performance.



DELEGATION

I. Why Managers don't Delegate

Many managers spend time on work that could be more efficiently done by team members thus freeing up time for more important work. At the same time your team may feel they don't get enough opportunity to develop the skills they would like to progress.

There are many perceived barriers to delegation including the following:

- · Not knowing what you can delegate that would be helpful to you
- How to delegate responsibility and not just delegating tasks
- Achieving the right balance delegating too much may result in a loss of control, while failing to delegate or not delegating enough can lead to duties not being completed as well as a demotivated and uncooperative team
- Not fully understanding the skills and existing workloads of your team members
- Being unsure of what responsibilities could serve as a learning and growth opportunity for members of your team
- Not feeling you have had role models along the way to show you how to delegate successfully
- Perceived reputational risk
- An individual's 'it's not my job' attitude (outside my job description)
- The 'if you want a job done properly, do it yourself' philosophy

However, there are many benefits of delegation:

- Helps reduce pressure on your time
- Allows you to allocate time to tasks only you can do
- Tasks are completed quicker
- Decision making can be improved
- Individual team members can develop their skills
- The mix of the team is also improved, reducing reliance on you
- A more flexible, highly skilled team, offering a better service

2. Prioritisation and Delegation

There are a number of tools that can be used to help you decide and prioritise tasks to help you decide what to delegate to others. Two of these tools are briefly explained below.

a) Eisenhower Matrix - https://www.eisenhower.me/eisenhower-matrix



Reduce your time in box 3 as much as possible by turning off notifications and allocating time to deal with emails, creating quiet space and only attending meetings that are valuable to you and the other attendees.

Exit box 4, except for occasional "comfort work" (work that you enjoy but is of little value).

b) Do, Delegate, Delay, Delete

This quick and simple method makes sure you use your time more effectively by sorting tasks into four categories: delete, delegate, defer and do.

- Do It If the job is urgent, it's better to do it immediately.
- Delegate If there are tasks that could be taken charge of by someone else, then delegate it.
- Defer it Prioritise. Know that accomplishing certain tasks can be deferred to a later time
- Delete

If the task does not require your attention or is worth your time, simply delete it.



Spend a few minutes each day prioritising work and determining what can be delegated.

3. How to Delegate

There are many useful tools that take you through the steps of delegation. Google's 7 Steps to Delegating is one such tool and can be summarised below. A worksheet on Google's tool can be found at the end of this toolkit.

I. Give an overview of the work.

Discuss the scope and significance of the project.Tell your employee why you selected them and the impact the work has on the business.

2. Describe the details of the new responsibility.

Discuss your desired outcome and clarify expectations. Tell the employee what you expect, but not how to do it. It's essential to give them the autonomy and freedom to learn and grow from the experience – not just follow orders.

3. Solicit questions, reactions, and suggestions.

The conversation should be a two-way street. Remember, the ultimate goal is to put your employee in the driver's seat. Make sure they have all the information they need to assume ownership and accountability, and to meet expectations.

4. Listen to the individual's comments and respond empathetically.

This is new and uncharted territory for your employee. Ease their anxiety and create a psychologically safe environment where the employee feels comfortable voicing concerns, discussing hesitations, and coming to you for help.

5. Share how this impacts the team.

So, employees understand the importance of their work and prioritize accordingly, make sure you connect the dots and explain how the task supports other team initiatives.

6. Be encouraging.

Employees won't take full responsibility until you encourage them to do so. Make sure they understand that you're trusting them to deliver results.

7. Establish checkpoints, results, deadlines, and ways to monitor progress.

Although they have autonomy, make sure employees know the critical milestones they need to hit and what success look like to gauge progress.

The following Delegation Tool is another example of what to do to plan for a productive delegation discussion.

- I. Who is the best person to delegate to? (it isn't always about who can do it). Who needs to develop these skills? Who has capacity? Who has shown interest? Who is ready for a challenge? Who would see this as a reward?
- 2. Why you selected the person who will take up the task.
- 3. What are their past experiences? Current responsibilities? Their manner with others? Do they have a good work-life balance? Is the task going to fit in well to requirements of their personal development plan?
- 4. Are you clear about what the person is responsible for and how much autonomy they have? Daniel Pink writes that people often want autonomy over task, team, technique, and time. Successful delegators let their team members know exactly where they have autonomy and where they don't (yet).
- 5. What you will need to explain about the task and its requirements?
 - The desired results in detail. This includes setting clear expectations about the outcome ("what it is"), how the task fits into the bigger picture ("why we're doing it"), and criteria for measuring success ("what it should look like when done well")
 - The timeline required
 - What they might need to get the task done
- 6. Do team members have the resources they need to do the job, whether it's training, budget, supplies, time, a private space, adjusted priorities, or help from others?
- 7. Have you established checkpoints, milestones, and junctures for feedback so that you neither micromanage nor under-lead.
- 8. Encourage new, creative ways for team members to accomplish goals. It's important for you to set aside your attachment to how things have been done in the past, so that you can invite, recognise, and reward novel approaches that work.
- 9. Have you created a motivating environment? Successful delegators know when to, coach, step in, step back, adjust expectations, make themselves available, and celebrate successes.
- 10. Can you tolerate risks and mistakes, and use them as learning opportunities, rather than as proof that they shouldn't have delegated in the first place?



Always be clear and supportive when delegating. If the delegated work isn't done well reflect on why and what you could do better next time.

DECISION MAKING

Making effective decisions as a manager is a very significant challenge in a fast-moving world. Increasingly managers are expected to act under conditions of uncertainty or limited information, which have a considerable impact at every stage of the decision-making process.

As a manager, you will need to apply your skills to select the most appropriate approach for the context you are operating in and the kind of decision you need to make. Good decision making skills will enable you to understand what information you will require and how best to use it to inform your decision, as well as helping you to avoid unhelpful or biased assumptions, and recognising the degrees of uncertainty and risk involved and whether these are acceptable in the circumstances. Understanding the implications of your decision, including the impact on departmental and organisational objectives, will help you to avoid costly mistakes and make decisions that add value.

I. Accountability

The difference in accountability and responsibility. Simply put, the difference between the two terms is that responsibility involves having authority over one's actions. Accountability means you are liable or answerable for one's actions. In order to be responsible, you must be accountable and vice versa.

But what does accountability look like?

First and foremost, it means that you accept responsibility for the outcomes expected of you — both good and bad. You don't blame others. And you don't blame the external environment. There are always things you could have done—or still can do—to change the outcome.

Until you take responsibility, you are a victim. And being a victim is the exact opposite of being a leader.

Victims are passive. They are acted upon. Leaders are active. They take initiative to influence the outcome.



2. Whose Decision is it?

The following diagram can help you to decide who should be making the decision.



When thinking about whose decision, ask yourself how much accountability and autonomy exists in making the decision. Where you have accountability and autonomy, the decision is largely yours to make so do it or delegate. If your accountability is high but autonomy low, who are the colleagues involved and how do you influence them. If accountability is low but autonomy high, ask why is that and what can you do to give yourself more accountability to make the decision. If both are low, then challenge yourself on why you are getting involved.

3. The Decision-Making Process Check List

You can use the following steps in the decision-making process.

- Identify the decision that needs to be made don't forget to take an objective approach.
- 2. Ensure you're clear about the scope of the decision decisions can be,
 - a) those we make every day.
 - b) involve strictly governed processes and predictable outcomes, which you will have little discretion in.
 - c) are complex with many inter-relating factors that may have multiple options and outcomes and may be subject to influence by multiple groups and individuals.

Perhaps only a broad goal can be identified at the start of the process, with no set way to achieve it. In some cases you may have time to make the decision but with others it may be essential to make decisions urgently. In all cases it is necessary to define exactly what needs to be decided (and what does not need to be decided) at that point in time. Once you are clear on the scope of the decision, check whether you can identify established methods for making similar decisions that have previously been made. Are there already rules or regulations in place that will dictate how and by whom this decision is made? If not, are there any guidelines?

3. Decide who needs to be involved in the decision making process – Inevitably there will be people who need to be consulted, informed or influenced. Consider who these stakeholders are, and how you will go about gathering their contributions or making recommendations to them. Stakeholder Analysis methods could be helpful here, for example,

Stakeholder analysis of decision making



Power-Interest Grid

- 1. High power, high interest: These are your most important stakeholders, and you should prioritise keeping them happy.
- 2. High power, low interest: Because of their influence, you should work to keep these people satisfied. But because they haven't shown a deep interest, you could turn them off if you over-communicate with them.
- 3. Low power, high interest: You'll want to keep these people informed and check in with them regularly to make sure they are not experiencing problems
- 4. Low power, low interest: Just keep these people informed periodically, but don't overdo it.



Do not forget to consider people whose work will be directly impacted, especially since you will be dependent upon their commitment to implement the decision.

Questions to ask yourself at this stage include:

- a) Who has the formal responsibility for the decision?
- b) Who will be accountable for its success or failure?
- c) Who has the experience or expertise to contribute to making the decision?
- d) Who will ensure that it is implemented properly?
- e) Who controls the resources necessary for implementation?
- f) What external factors may affect the decision?
- g) How you can reprioritise when the context changes (e.g. short term political v long term management priorities).
- 4. Gather the facts and information together you must of course know exactly what you have to decide but also what does not need to be decided at that point in time. It is possible that you may need to refine your definition when you have gathered more information, but it is crucial to have a working definition before you begin to collect these details. Gathering relevant and accurate information will help you to evaluate the available options. Consider the specific elements that are required to make the decision, and then consider what information is actually available or can easily be accessed. In some cases, the available information may be limited and the time constraints tight. This is likely to shorten the information-gathering stage and increase dependence on your managerial experience or intuition.

In slower-paced situations be aware you can become bogged down in analysing every bit of available information before making a decision. Often the answer will not become any clearer, and in the meantime you may have missed the opportunity to act at the time when your decision would have produced the best results. Meanwhile, excessive information gathering can produce an illusion of control by hiding uncertainties and leading to over-confidence. However, experience and intuition alone are rarely sound methods for making good decisions. **5. Gather appropriate contributions** – other colleagues will be able to contribute to defining the decision to be taken, gathering relevant information, or making the decision.

Wide participation in decision-making has advantages, including:

- a) engagement, leading to a feeling of 'ownership' of the decision
- b) confidence in the legitimacy of the decision
- c) opportunities for the decision to be challenged
- d) increased transparency.

While a decision in which more people have participated may appear to be more legitimate, teams can fall victim to 'groupthink' or exhibit unhelpful group dynamics. They may follow the lead of a particularly dominant individual, or may share a collective bias that leads them to gloss over dissenting views or ignore crucial signals. One method of preventing groupthink is the Stepladder Technique which uses face-to-face interactions. Individuals are all asked to consider the problem independently and record their thoughts before joining the group one by one and contributing their views before hearing those of others.

In order to get the best from a decision making team:

- a) create a constructive environment where dissent is welcome
- b) ensure that dissenting views are fully explored
- c) actively seek out information that challenges your recommendations
- d) keep groups small to maximise effectiveness, since large groups can become unfocused
- e) be aware of others' motivations and interests and be careful that the issue or decision is not being framed in a way to influence you.



Time spent gathering facts and contributions should be proportionate to the size and risk of the decision.



- 6. Generate options as you gather the information together you will probably identify several different paths of action or alternatives You can also use your imagination and additional information to construct new alternatives. In this step, you will list all possible and desirable alternatives.
- 7. Consider the potential impact of the decision and how this will be

evaluated – as you start to weigh up the evidence, you'll begin to favour certain alternatives: those that seem to have a higher potential for reaching your goal. Finally, place the alternatives in a priority order, based upon your own value system. A major part of decision making involves the analysis of a defined set of alternatives against selection criteria. These criteria usually include costs and benefits, advantages and disadvantages, and alignment with preferences.

Consider the scope of the decision and its potential impact. Who and what will be directly affected? Are there indirect implications for other stakeholders or services?

Remember to consider how the decision relates to the overall objectives, since these may be helpful in delimiting acceptable options, and will provide some criteria against which to evaluate decisions. Will the decision help to progress towards meeting a particular objective? Would certain choices have a negative impact on the meeting of other objectives?

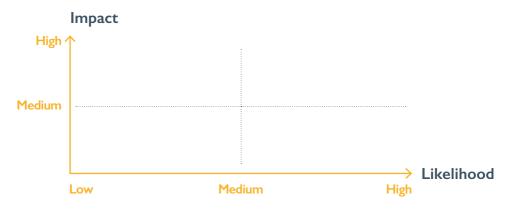
8. Take account of uncertainty and risk – it is important to accept that there will almost always be a degree of uncertainty about outcomes. Even if you are fairly confident that you understand the implications of your decision in the current situation, the long-term impact may be less clear. For example, rapid change could happen when a tipping point is reached, meaning that past results are poor predictors of the future. Often, there is a further degree of ambiguity when there is less information available at the time than you would prefer.

Recognising and accepting uncertainty is important even if you cannot resolve it. The actions you take will also be dependent on your own or your organisation's attitude to risk. Your level of 'risk aversion' is the extent to which you prefer a more certain outcome, possibly with a lower payoff, over an uncertain outcome with a potentially higher payoff. Think about how prevailing levels of risk-seeking or risk aversion in your situation may affect your decision

Consider the best and worst case scenarios, and what the impact of these would be. Always try to consider the 'outside view' – for example you might believe from an insider perspective that the organisation will be successful in its change project, but what is the historical rate of success for similar projects across your sector? Is your project plan stronger or weaker than similar ones?

The following quadrant can be used to map out the risks of your decision and assess your appetite for risk.

Risk Assessment Quadrant



- 9. Use decision making tools which fit the situation Decision making tools can be applied to help you to evaluate and compare alternatives. The choice of tool will depend on the situation. If there is time available to evaluate options thoroughly, and the options can be appropriately quantified, the following methods could be helpful:
 - a) Kepner and Tregoe's rational model encourages managers to determine which factors are most important in a decision and to weight options according to how well they meet requirements. For a complex technical decision, for which plenty of time has been allocated, this can be an effective and transparent process for reaching a conclusion. However under conditions of uncertainty or rapid change, this method maybe too cumbersome to be viable.

http://www.free-management-ebooks.com/news/kepner-tregoe-matrix/

- b) Decision trees can be used to represent uncertainty, revealing the risks and potential rewards of alternative courses of action. The division of the tree into branches shows the points at which choices can be made, and the possible outcomes of these choices. Probabilities are assigned to each outcome, as well as estimates of how much value each would deliver. The expected value of each choice (values x probabilities of all possible outcomes) can then be calculated. https://www.mindtools.com/dectree.html
- c) The Plan-Do-Check-Act (PDCA) cycle suggests making incremental decisions and following these up with actions, and then analysis, before moving forward. https://www.mindtools.com/pages/article/newPPM_89.htm

'Shortcut' strategies, for use if time is limited or the decision is less complex, include:

Paired comparisons. If you are considering multiple options, pairing them and comparing their performance on key requirements allows you to quickly eliminate options, allowing only the preferred options to progress to the next 'round'. You could then use another decision making tool to make the final choice.

- a) PMI plus/minus/interesting is a kind of 'pros and cons' list used to make binary yes/no decisions, where you also record any interesting implications of the choice that do not clearly fit into the 'plus' or 'minus' columns. Before you start, it is important to ensure that a binary decision is really what you are faced with, and that you are not excluding other valid options.
- b) The Pareto Principle states that 20% of inputs deliver 80% of results. It can be applied and holds true in a surprising variety of situations. If you are aware of where this principle applies in your business, you may be able to work out which change option could deliver the greatest benefits.

Finally, intuitive 'hunches' may be your brain's way of communicating information that it has subconsciously received, based on pattern recognition. Knowing when to act on these hunches is a useful skill for managers to develop - in certain time-critical situations, for example, your intuition may be a crucial factor. The extent to which you can employ intuition may depend on your organisation or role. Remember that you will need to convince others of the validity of your decision in order to achieve buy-in, which could be more difficult if you are unable to rationalise your choice. Consider:

- a) your place within the organisation research has shown that those who are higher up in the organisational hierarchy are more likely, and perhaps more able, to act on their intuitive hunches
- b) the nature of your work managers in customer services, human resources, marketing and sales are more likely to be intuitive decision makers
- c) the size of your organisation making decisions in this way is often more acceptable in smaller organisations, while larger businesses tend to rely more on analytic processes.

A good way of checking the validity of intuition or experience based decisions is to search for evidence the decision may not be right. That is to say look for reasons to invalidate your decision not reasons to validate. If you search and can't find evidence to invalidate, then maybe the hunch is right. Involving colleagues in this approach can be helpful.

10. Watch out for biases and common psychological traps – Our responses to situations are prompted by a complex array of factors influenced by our background, experiences and even hard-wired evolutionary responses. This can easily lead you into traps where you are misled into making sub-optimal decisions.

Common psychological traps that can impair our decision making include:

- a) confirmation bias uncritical acceptance of information that confirms existing beliefs
- b) false analogy assuming that the situation is just like a previous one, ignoring the differences
- c) availability bias allowing your mind to construct a narrative only from the information that is immediately in front of you
- d) tunnel vision failing to see the 'big picture' while focusing on the detail
- vividness ignoring more mundane alternatives in favour of the most vivid option, for example being swayed by a sales pitch into making an instant decision without considering alternatives
- f) sunk cost fallacy giving weight to resources that have already been spent, when these do not have an impact on the future costs and gains of pursuing an alternative
- g) loss aversion a preference for avoiding possible losses over pursuing possible gains.

The first step to avoiding these traps is to be aware of them, but this is unlikely to be enough to eliminate them. Including more people in the decision could help, since it is easier to spot biases in others' thinking that to recognise them in your own. Crowdsourcing techniques have been shown to reduce errors in decision making, since they allow many people to pool their knowledge on an equal footing.

Chip and Dan Heath, in their book Decisive, propose a simple framework – the WRAP framework – for avoiding psychological traps:

- a) Widen your options expand your set of choices as far as possible
- b) Reality-test your assumptions collect reliable information and explore dissenting views
- c) Attain distance before deciding avoid making decisions based on short-term or emotional factors
- d) Prepare to be wrong what will happen if things do not go according to plan?

Practice Tip -

If you hear yourself or others justifying a decision because it's common sense, based on gut feeling or experience, then challenge and analyse again

- **II. Chose which option you're going to take** Once you have weighed all the evidence, you are ready to select the alternative that seems to be best one for you.
- **12. Communicate the decision and act on it** However you reach your decision, communicating it clearly is crucial. Your communications should:
 - a) be timely
 - b) include all stakeholders
 - c) explain how and why the decision was made
 - d) clearly explain the consequences of the decision.
- 13. Learn from outcomes and feedback One of the most important factors in improving your decision making is feedback. In some cases, feedback may be quick and clear. In others, such as long term investment decisions, it may take some time for the impact to become apparent. It may also be ambiguous the decision moved the organisation forward in some ways, but held it back in other areas. However long it takes for the lessons to become clear, they should not be ignored. Keeping a record such as a decision making journal could help you to continuously hone your decision making skills and recognise traps in your own thinking.



Review your decision making process after each decision to identify how it could be improved. And if your decision needs changing don't be afraid to do it.

4. Evidence Based Management: The Decision-Making Process

Evidence-based practice is about making better decisions and informing action that has the desired impact. An evidence-based approach to decision-making is based on a combination of using critical thinking and the best available evidence. It can enable you, as a decision maker to be less reliant on anecdotes, received wisdom and personal experience – sources that are not trustworthy on their own. You have an obligation to find the best evidence when making important decisions to strengthen the well-being of your team as well as ensuring organisational success.

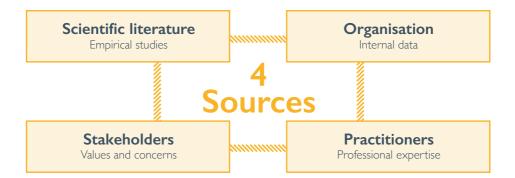
Why is evidence-based practice important?

It's common in decision-making for popular ideas of management, and personal experience, which is highly susceptible to errors and bias, to be prioritised ahead of sound, critically-appraised evidence. Individuals at all levels of employment have a moral obligation to use the best available evidence when making important decisions.

Assessing the reliability and validity of evidence becomes ever more important as the mass of opinion and claims available continues to grow. We have limited cognitive resource and time, therefore our minds naturally use mental shortcuts or 'heuristics' to make decisions easier: our brains are far less able to multi-task than we generally expect. This opens us up to a number of types of bias. Received wisdom and the notion of 'best practice' also creates bias. One organisation may look to another as an example of sound practice and decision-making, often without critically evaluating the effectiveness of their actions.

The Four Sources of Evidence

In order to find out what is known you can analyse 4 key sources:



Evidence-based practice

- 1. Scientific literature through academic journals. The importance of research from outside of management should also not be forgotten, since many issues you face (communication, conflict, decision-making) are salient to other domains, such as psychology and sociology. As a result of this development, the ability of management to search for and appraise research for its relevance and trustworthiness is essential.
- 2. Organisational data must be considered because it allows you to understand issues which require your attention. This data can come externally from customers or clients (customer satisfaction, repeated business), or internally from employees (levels of job satisfaction, retention rates). There is also the comparison between 'hard' evidence, such as turnover rate and productivity levels, and 'soft' elements, like perceptions of culture and attitudes towards leadership. Gaining access to organisational data is key to determining causes of problems, solutions and how to implement solutions.
- **3. Expertise and judgement of practitioners, managers, consultants and business leaders** is important to ensure effective decision-making. This professional knowledge differs from mere opinion as it is accumulated over time through reflection on outcomes of similar actions taken in similar contexts. Consequently, it reflects the specialised knowledge acquired through repeated experience of specialised activities.
- 4. Stakeholders, both internal (employees, managers, senior leaders, councillors) and external (suppliers, shareholders), may be affected by the organisation's decisions and the consequences of these. Their values reflect what they deem important, which, in turn, affects how they respond to the decisions of an organisation. Therefore, gaining knowledge of their concerns provides a frame of reference form which to analyse evidence from other sources.

6 Steps

Asking

translating a practical issue or problem into an answerable question.

Acquiring

systematically searching for and retrieving evidence.

Appraising

critically judging the trustworthiness and relevance of the evidence.

Aggregating

weighing and pulling together the evidence.

Applying

incorporating the evidence into a decision-making process.

Assessing

evaluating the outcome of the decision taken to increase the likelihood.

Combining the Evidence

One extremely important element of evidence-based practices is bringing evidence from a number of sources together and subsequently facilitating informed decision-making. There are six ways – depicted in our infographic below – which will encourage this.

Through these six steps, evidence-based practice enables you to ensure the quality of evidence is not ignored, as is often the case in decision-making processes. You can evaluate the trustworthiness of evidence available. Appraisal varies depending on the source of evidence, but generally involves the same questions:

- Where and how is evidence gathered?
- Is it the best evidence available?
- Is it sufficient to reach a conclusion?
- Might it be biased in a particular direction? If so, why?



FURTHER READING

Delegation

Hidden Value: How Great Companies Achieve Extraordinary Results with Ordinary People. O'Reilly and Pfeffer https://www.amazon.com/Hidden-Value-Companies-Extraordinary-Ordinary/dp/0875848982

Google's 7 Step Process to Delegating Tasks that Any Manager Can Use. Schneider. https://www.inc.com/michael-schneider/google-found-that-its-best-managers-share-authority-nowit-teaches-them-to-delegate-using-this-7-step-process.html

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What do you need to control – and what can you let go? 2017. https://www.peoplemanagement. co.uk/experts/advice/what-do-you-need-to-control

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Three keys to faster, better decisions. McKinsey and Company. 2019. https://www.mckinsey.com/business-functions/organization/our-insights/three-keys-to-faster-better-decisions

Decision Making in the age of Urgency. McKinsey and Company. 2019. https://www.mckinsey.com/business-functions/organization/our-insights/decision-making-in-the-age-of-urgency

Why diversity of thinking is key to successful decision-making, 2017. https://www.peoplemanagement.co.uk/voices/comment/diversity-thinking-key-decision-making

STEPS TO CREATIVE DELEGATION

I. Look at the goals. What is the end-game, and what does the team need to do to achieve its goals? Break down the work and identify parts that can be delegated.



24

2. Look at yourself. In which areas do you have strengths and responsibilities, and what should you delegate?

3. Recognise the right person for the work. Take a look at your team's skills and ask yourself who has clear strengths in the areas you want to delegate. Use your employees like "chess pieces" and strategically assign work that plays to their abilities. In the process, you'll not only empower but also increase the overall productivity of the team.









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