



## The Steps of Successful Lawyer Delegation

### **1 Define the task**

Confirm in your own mind that the task is suitable to be delegated. Does it meet the criteria for delegating?

### **2 Select the individual**

What are your reasons for delegating to this person? What are *you* going to get out of it? What are *they* going to get out of it?

### **3 Assess ability and training needs**

Is this person capable of doing the task to your satisfaction at this time?

### **4 Explain the reasons**

Explain why the task is being delegated to them specifically and why at this time. What is its importance and relevance? Where does it fit in the overall flow of the cases you're working on?

### **5 State required results**

What must be achieved? Clarify understanding by getting feedback from the delegatee. How will the task be measured? Make sure they know how you will determine that the task was successfully done.

### **6 Consider resources required**

Discuss and agree on what is required to get the job done properly. Consider people, location, premises, equipment, money, materials, other related activities and services.

### **7 Agree deadlines**

When must the job – and any discreet elements of it -- be finished? Or if an ongoing duty, when are the review dates? When are the reports due? And if the task is complex and has parts or stages, what are the priorities? At this point you may need to confirm understanding with the other person of the previous points, getting ideas and interpretation. Methods of checking and controlling must be agreed with the other person. Failing to explicitly agree on these in advance will cause this monitoring to be experienced by the delegatee as interference or lack of trust.

### **8 Support and communicate**

Think about who else needs to know what's going on and inform them. Involve the other person in considering this so they can see beyond the task or project at hand. Do not leave it to the person to inform other teammates of their new responsibility. Warn the person about any awkward matters of politics or protocol. Inform anyone to whom you're accountable if the task is important, and of sufficient profile.

### **9 Feedback on results**

It is essential to let the person know how they are doing, and whether they have achieved your objectives. If not, you must review with them why things did not go to plan, and deal with the problems. And remember to give them credit for their success on first-time or non-routine tasks.



## The seven levels of delegation

Delegation isn't just a matter of telling someone else what to do. There is a wide range of autonomy that you can grant the other person. The more experienced and reliable they are then the more freedom you can give. The more critical the task then the more cautious you need to be about extending a lot of freedom. Take care to choose the most appropriate level for each situation.

**1 "Wait to be told." or "Do exactly what I say."**

No delegation at all. (This is an instruction, not a true incidence of delegation)

**2 "Look into this and tell me what you come up with. I'll decide."**

This is asking for investigation and analysis but no recommendation.

**3 "Give me your recommendation, and the other options with the pros and cons of each. I'll let you know whether you can go ahead."**

Asks for analysis and recommendation, but you will check the thinking before deciding.

**4 "Decide and let me know your decision but wait for my go ahead."**

The other person needs approval but is trusted to judge the relative options.

**5 "Decide and let me know your decision, then go ahead unless I say not to by this date."**

Now the other person begins to control the action. The subtle increase in responsibility saves time.

**6 "Decide and take action but let me know what you did."**

Saves more time. Allows a quicker reaction to wrong decisions.

**7 "Decide and take action. You don't have to check back with me."**

The most freedom that we can give to the other person.

## The Delegation Contract

Variously called *contracts* or *psychological contracts* or *emotional contracts*, these expressions refer to the process of *agreeing with the other person about what they should do and the expectations linked to the responsibility*. The point is that people cannot actually be held responsible for something to which they've not agreed. People are more committed to delivering a responsibility if they've been through the process of agreeing to do it. This implies that they might have some feelings about the expectations attached, such as timeline, resources, budget, purpose, method, etc. You must give the other person the opportunity to discuss, question and suggest issues concerning expectations attached to a delegated task.