

Freedom and Fortune Series

# The 5 Levels of Effective Delegation



## 5 Levels of Effective Delegation

**Level 1 delegation:** You want the person to do exactly what you've asked them to do. No more, no less.

In this situation, you would say something like, here's what I need you to do. Do not deviate from my instructions. I've already researched the options and determined what I need you to do.

Phrasing is important here. So, let's unpack each part. *"Here's what I need you to do."* This is where you will explicitly tell the person what you want them to do. No one can read your mind. So be crystal clear. Do not deviate from my instructions. This creates a hard boundary and makes your expectations clear.

*"I've already researched the options and determined what I want you to do."* Provides the rationale and the context for why you've chosen this level of delegation. This level is perfect for new hires, entry level people, contractors, or virtual assistants or for any other time, you're clear on what needs to be done, and you just need someone to do it.

**Level 2 delegation:** you want the person to examine or research a topic and report back to you. That's it. And in level two situation the person you're delegating to will only do research. They won't take any other action on your behalf.

For example, you might say, here's what I need you to do. I want you to research the topic and report back to me with your findings. We will then discuss it and I will decide and tell you what I want you to do.

Again, each phrase matters. So, let's break them down. *"Here's what I need you to do."* Be explicit. Your job is to make sure they understand the assignment.

*"I want you to research the topic and report back to me with your findings."* Clarify what you mean by research at this point. Do you just want them to Google it? Do you want them to conduct an online survey? Call several customers? Solicit bids from vendors? In other words, this is where you're clarifying the scope of the research you want done. Clarity is key here.

*"We will then discuss it and I will make a decision and tell you what I want you to do."* At this point, you're setting two critical expectations. First, you're letting them know that you will have a conversation to discuss their findings. Second, you're making sure that they know you're the

one who will make the decision. This is where you set the boundary and they are not authorized to take any action or to make any decisions.

Level-2 is great to use anytime you're not ready to make a decision and need someone to gather information for you. Once the data is in, you will have what you need to decide.

**Level 3 delegation:** Starting with level three, you're giving the person more room to operate and participate in problem solving process. But you are still making the final decisions for yourself.

You would say here's what I need you to do. Research the topic, outline the options, then make your recommendation. Give me the pros and the cons of each option. But tell me what you think we should do. If I agree with your decision, I will authorize you to move forward.

Let's break it down like before.

*"Here's what I need you to do."* Be explicit. The same rules apply here as above.

*"Research the topic, outline the options and then make a recommendation."* Just as in level -2 to be clear about the level and type of research you want them to perform.

Now you're taking an extra step though, by asking them to *"evaluate the options and actually pick one."* You want them to make the decision, but you aren't giving them the authority to implement it.

*"Give me the pros and the cons of each option. But tell me what you think we should do."* Here you're asking them to show their work. In other words, they shouldn't expect you to agree with their decision without first giving you a chance to see inside their thought process. This is where they'll explain why they made the decision they made.

*"If I agree with your decision, I'll authorize you to move forward."* At this point, it's their job to convince you their decision is the right one. If they can't, their research and arguments are both at fault. If they done their job well however, you can and should give the final approval and authorize them to move forward.

This is a great option for delegating to future leaders that you're mentoring, because it gives you a safe opportunity to judge their decision-making skills without any risk. And you probably noticed that this is the level where you start to outsource your decision making.

At this stage you can make a well-informed decision on a complex topic in one simple meeting. What may have taken you a full week could now be knocked out in one hour.

**Level 4 delegation:** At this stage, you want the person to evaluate the options, make a decision on their own, execute that decision and then give you an update after the fact.

You would say here's what I need you to do. Make the best decision you can, then execute. Afterwards, tell me what you did. Sometimes you might want to add, keep me apprised of your progress.

You're close to cloning yourself at this point. So don't slow the process as it should be getting exciting. Let's break this level down.

*"Here's what I need you to do."* Same as above.

*"Make the best decision you can."* You're explicitly asking them to make a decision but they need to put the work in first. In other words, they'll do the same research as in level three, but they're doing it to inform their own decision-making process rather than yours.

*"Then execute."* make it clear. You expect them to act without waiting on you. This is the first time in the process where you've taken your hands off the wheel. So be sure it's a person you can trust to act on your behalf.

*"Tell me what you did."* I need to be clear here. This is not an opportunity for you to second guess the decision they made. It's done and there is no going back. This step is simply about good communication and keeping you informed. It also gives you insight into the quality of their decisions, which is good to know for future delegations.

*"Keep me apprised of your progress."* This part is optional and is primarily helpful for projects that have a lot of moving parts or will take a long time to complete.

You could even be explicit about the type of updates you'd prefer such as weekly email or adding it to an existing meeting agenda.

This is a great level of use with growing leaders because it empowers them with decision making experience and gives you plenty of opportunities to evaluate how well they are doing.

It is also a useful level for assignments that are not mission critical and for which you don't have a strong preference regarding the outcome, such as having your assistant organize and execute Christmas gifts for your clients.

**Level 5 delegation:** At level five you're effectively handing the entire project or task over to someone else and exiting the decision step and execution step altogether.

Say something like this.

Here's what I need you to do. Make whatever decision you think is best. There's no need to report back or tell me what you did.

At this stage, you've cloned yourself. This is where you really start to see the benefits of delegation. Let's unpack this level five.

*"Here's what I need you to do."* Same as above.

*"Make whatever decisions you think is best."* Like level four, you're explicitly asking them to make the decision after doing the research, evaluating the pros and cons and exploring the best options.

*"There's no need to report back or tell me what you did."* This is really the only thing that makes level five different than level four. With this statement, you are releasing them from any obligation to get back to you and you are officially exiting the process.

Level five is where delegation magic happens. It's perfect for when you have complete confidence in the person to whom you're delegating. Or if it's an assignment that needs to be handled, but you really don't care how it is resolved.

Examples of level five delegation might be asking your marketing director to decide on a marketing budget for a new product launch or asking your technology director to replace your CRM.

Using the five levels of delegation can transform your personal workload and reduce your stress while also giving your team members ample opportunity to up their own game by progressing through different levels with you. It's a win-win for everyone.

I suggest implementing this process by walking your entire team through the five levels, and explain how you're going to approach delegation with them and as an organization from now on.

Give them the big picture, and maybe even incorporate the levels by name into your company vocabulary. All this will work to create a much safer, clearer environment in which everyone knows what responsibility they have in the delegation situation.