

Hosted by Tom Henschel

The Three Elements of Effective Delegation

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With her company on the brink of disaster, a leader hungrily tackles the art of delegation, learning three models on the way.

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A Founder Flounders

Ngyuen was terrified her company was going to collapse. She had spent years creating a Hanoi-based clothing company that was completely locally crafted: she commissioned fabric from women on local farms, she oversaw designs in her studio, and she supervised local manufacturing.

And the company had thrived.

Demand had increased three years straight, to the point where now Ngyuen was struggling to keep up. To mix her blessings, a European fashion magazine was poised to feature the company in a lead article. Ngyuen worried that a subsequent swell of orders could swamp the company beyond repair.

“There just aren’t enough hours in the day,” she told me during our first coaching conversation. “I’ve always done pretty much everything myself, but now there’s too much. I’ve got a staff, but none of them are A players – they’re what I can afford – but they’re not ready to do what I do.”

“Even though it’s their job?” I asked.

She shrugged. “Like I say, it’s who I could afford.”

“Do you imagine they don’t *want* to do the work, or they don’t know *how* to do the work?”

“No, I think they want to. Most of them. I think they believe in the company.”

“So, it’s a skills issue, not a will issue?” I asked.

“‘Will’ means what exactly?” she asked. “Wanting to do the work?”

I nodded, agreeing. “The whole way they think about the work. They’re attitude, their readiness, their ‘will.’ Does something in their will make them not ready to do the work?”

“I hope not,” she said.

“We’ll figure it out. The question is what do they need to be ready to do the work? If it’s a skill issue, you’ll train them. If it’s a will issue, you’ll coach them. Skill and will. You get them ready because the work is coming!”

She gave a little laugh. “I hope!”

“ The first part is figuring out what to delegate.

I held up a finger. “We’ve gotten a little ahead of ourselves. Can I back us up? You said there aren’t enough hours in the day. I immediately thought, ‘Some part of the solution is going to be delegation.’ This ‘Skills and Will’ idea is one part of delegation, but it’s not the first part. The first part is figuring out what to delegate. Identify the goal. So, can I ask, if one part of your job could be better tomorrow, what would it be? What would make you happy if it were different?”

Identify the Goal

“I would love to be back on the farms again. That would make me happy. But I can’t. Each trip takes days, and I can’t be productive when I’m out there. I only get out once a year now, if I’m lucky. I really miss that. But realistically, what would make me happy? Not having to supervise Operations. I would like to trust that Operations are doing their job. That would make me happy.”

“And what’s in the way of Operations doing their job?” I asked.

“Orlando,” she said. “I don’t trust him. He tells me what I want to hear, and then I find out it isn’t true. Things don’t get done the way they should.”

"Perfect," I said. "So, one thing that will make your life better is to manage Operations less. But for you to step back, Orlando has to step up. I'd like to use that task – having you step back and him step up – as an example for effective delegation. Sound okay?"

"Are you kidding? That would be amazing," she said.

The Three Elements of Delegation

"Okay," I said, "so for this task, and every task you delegate, you'll screen it against three filters. First is the 'Skills and Wills' filter we were talking about. Do they need training or coaching? You decide, then communicate that.

"The second filter is control," I went on. "When you delegate a task, are you giving it away and never want to see it again? Or do you want to maintain some involvement? Who has what level of control? You decide, then communicate that.

> **Everyone needs to know what actually has to get done.**

"The third filter is identifying the actual steps, the action items, the tasks, the milestones. Everyone needs to know what actually has to get done. You decide, then communicate that."

She deflated. "Oh my gosh, this sounds like so much work."

I nodded. "I know. I'm sorry. If you're going to delegate effectively, it's going to slow you down for a bit..."

"When I can least afford it!" she interjected.

"...but it'll allow you to speed up later."

"And I can't really afford not to, can I?" she said. "So okay. Can we use Orlando as an example for that first filter? 'Skills and Will,' right? What should I be asking myself?"

Bucket One: Skills and Will

"I'd ask, 'What does Orlando need to know, or be able to do, so you can be comfortable handing off the work to him?"

"He has to show me he can hit his dates. Start dates. Delivery dates. Every date. Do what you say you're going to do. Get it done."

"And does he need training or coaching?" I asked.

"Probably some of both. I haven't given him much of my time," she said.

"And, pardon me for asking, Ngyuen, you're not delegating math to a dog, are you?"

"What?" she laughed.

> **But of course, it's a dog doing math–it's never going to happen.**

"A friend of mine had this gag for years. He'd complain all the time about his dog, about how, no matter how many times he explained math to the dog, the dog never got it. The joke was his extreme disappointment – that if the dog would just put in a little effort, he'd get it. But of course, it's a dog doing math – it's never going to happen. So, be realistic. Are you delegating math to a dog?"

She said, "I have someone on the design team who I think is a dog doing math. I'm going to have to move her out of her role, but no, not Orlando. I think he can do it."

"And he needs some training and some coaching before he's ready," I said. "So that's the first filter. 'Skills and will.'"

"And number two is about control. I want to hear about that."

Bucket Two: Control

I said, "Right. The question about control is who has it and how much. I use a model by a guy named Michael Hyatt. He talks about the *Five Levels of Delegation* and how each level has its own degree of control. It's really helpful."

"I just pulled it up," she said, looking at her second screen. "Okay. It has the five levels. Want me to read it?"

"Sure," I said.

"First is **Level 1.** 'Do as I say. I give direction. You execute. I decide when its done.' Doesn't sound much like delegating to me, but okay. **Level 2.** 'Research and report. You gather information. I control the decision.' **Level 3.** 'Research and recommend. You pitch ideas. I control which ones advance.' I wish people did that more with me. **Level 4.** 'Decide and inform. You control the decision. I get kept in the loop.' Ooh, boy, that makes me nervous, but I've got to get there, don't I? And **Level 5.** 'You own it. You move forward independently.

I may or may not know about it.' I can't picture Orlando ever getting to level five, but if he were even at a three, that'd help."

"Can you imagine talking about this with him? Showing him the model and talking about how you'd like to work together?"

"Yes, it's helpful. I never thought about delegating levels of control. I've always thought of it like a switch – either it's mine or I give it away. And these levels could change over time, right?"

"Sure," I agreed.

"This is good. I'll keep this," she said, pointing at her screen.

Bucket Three: Steps and Actions

"Great," I said. "So, filter number three is quantifying how the work gets done. What steps get taken? Who's going to do them and how will we know if they're on track?"

She shook her head and said, "I'm not good at following up. Once I let go of something, it's out of my mind. As a company, we've gotten really bad at knowing how we're doing, and I think that's my influence. But I'm going to have to start, aren't I?"

> **If you don't measure what you delegate, it won't go well.**

"If you don't measure what you delegate, it won't go well," I said.

"Won't that be true with each of these filters? I going to have to measure everything or I won't know what's getting better."

"I think you'll know some things because you'll be spending your time differently," I said.

"Not managing Operations? That'd be a good thing!" she said.

Ngyuen put energy into developing her delegation skills. She broke down tasks and screened them against the three filters. It added to her workload, until one day when she realized a task had happened without her knowing. She celebrated. It gave her hope the company was moving toward *The Look & Sound of Leadership.*



The podcast episode continues from this point and dives deeper into the three filters.

Download our newest tool focusing on the three filters of effective delegation.

Core Concepts

- **Delegation demands time that gets paid back later.**
- **Get clear on exactly what you are delegating. Then filter it three ways:**
- **What do your people need to get ready? Skills or will? Training or coaching?**
- **How much control will you retain? Who is making decisions?**
- **What is getting done? Who is responsible?**

Questions Addressed

Q: How do I figure out what to delegate first when my plate is completely full?

A: The first step in the episode is not to hand things off randomly but to get clear about the goal: What part of your job would you most like to be different or better tomorrow? For the founder, that meant stepping back from Operations, which led to focusing delegation around helping her Operations leader "step up" so she could "step back."

Q: What are the three elements of effective delegation in this episode?

A: Effective delegation is presented as three filters: Skills and Will, Control, and Steps and Actions. For every delegated task, the leader clarifies what people need to be ready (skills or will), how much control the leader retains, and what concrete actions, responsibilities, and milestones will show progress.

Q: How can I tell whether delegation is a skills problem or a motivation (will) problem?

A: This episode introduces a "Skills and Will" filter that asks whether people lack the skills to do the work or the will and mindset to take it on. If it is a skills gap, the leader must train; if it is a will gap, the leader must coach attitude and readiness.

Q: How do I decide how much control to give up when I delegate?

A: The coach uses Michael Hyatt's *Five Levels of Delegation*, ranging from "Do as I say" to "You own it," to help the leader match the level of control to the situation and the person. Instead of treating delegation as an on/off switch, the leader consciously chooses and communicates everyone's level of control, with the goal of moving people to higher levels over time.

Q: How can I measure whether my delegation is actually working?

A: The episode notes that if you do not measure what you delegate, it will not go well, because you will not know what is getting better or worse. Signs of progress include tasks being completed without the leader's involvement, the leader spending time differently, and key people moving up through the levels of delegation.

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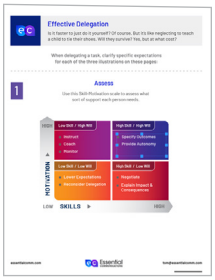
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