

# Becoming a Powerful and Effective Delegator

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I recently attended the AICPA ENGAGE Conference. The conference was amazing with exceptional speakers and great information. One of my favorite sessions was led by Jennifer Wilson from Convergence Coaching. It was titled, “Becoming a Powerful and Effective Delegator.” Here are some of my key takeaways from the session.

Delegating can be a difficult thing to do for a variety of reasons. The most common feeling is you are the most qualified or can complete the task more efficiently. While it is likely true you can complete the task faster, delegating creates an opportunity for talent to further their learning, grow in the role, and even discover ways to complete the task even more efficiently! Another reason delegating can be difficult is due to taking the time to complete training. While delegating does require investing in initial training, enabling someone else to own the task free allows you to maximize the time where your impact is greatest. Again, this gives others the opportunity to learn and will save you time in the long run. Finally, delegating can be extremely tough if you feel the individual is not ready to take on the task. The best way to learn something is by doing it. Sure, they may struggle, or even fail, but next time they will be able to apply their learnings! A great way to keep a pulse on their progress, without micromanaging, is to break the project into smaller tasks and check in as they complete the smaller tasks, so they don't get to the end and realize the first thing they did was wrong.

One of the biggest mistakes in delegating is failing to communicate clearly. Providing clear instructions or guidelines is critical. It is extremely important to communicate the following:

- **What:** This is what I am asking you to do. Give specifics on the task or deliverable. If you are breaking the project down into smaller tasks, go over each task and the entire project as a whole.
- **Who:** This is who “owns” the items within the deliverable. This is clear if you are delegating a task to one person, but if you are delegating a project to a group of people, be clear about which items belong to which person.
- **When:** This is when I expect delivery. Also, include when you want progress updates if it is a longer project or if you want to be informed on progress for each step.
- **Resources:** These are the resources I think you will need to accomplish this deliverable (e.g., materials, people, hours, etc.).
- **Return and report:** This is who and when to return and report the status or when the deliverable is complete. Is a quick IM at the end of the week okay for a status update, or would you prefer an email? Should a weekly check-in meeting be set up to get status updates of a long-term project?
- **Recap:** This is a written recap of what we have agreed to about this deliverable. Jennifer had the great suggestion of having the designee provide a written recap, ensuring their understanding of the assignment and have sufficient notes to proceed.

Jennifer also stressed the following advice when receiving delegation. Be sure to clarify the specifics of the assignment if you are confused. Keep the delegator updated as requested or even more often. Don't spin your wheels for too long. If you're struggling, reach out for help or use the resources provided by the delegator. Lastly, be sure to share conflicting priorities with the delegator. If the delegator wants a task done by a certain date but you can't make that happen or it will be close based on other work, let them know right away so they can ask someone else or adjust their timeline, rather than getting to the due date and them wondering why the task is not done.

Hopefully, these tips can help you with delegating and receiving delegation. I definitely plan on using them myself!

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