

WAYS TO DELEGATE EFFECTIVELY: 3 SOLUTIONS

KEY LEARNING

- Understand the importance of balancing trust in both people and organisational processes when making delegation decisions
- Recognise and apply the three proven delegation strategies according to the levels of trust in people and processes within their organisation
- Develop the ability to assess and improve delegation practices to enhance leadership effectiveness and organisational growth



Trust & Delegation

Our work in organisations across various sectors has shown that building trust between people alone isn't sufficient to make delegation effective. Leaders must also carefully assess the level of trust in the organisational processes and align their approach accordingly.

Delegation continues to challenge many leaders. Whether it's an overburdened manager looking to alleviate burnout or an executive aiming to take a well-deserved break, delegation is often necessary but frequently avoided. Handing over responsibilities can lead to anxiety, tension, or unsatisfactory outcomes. Yet, delegation is indispensable: for both individuals and organisations to grow, people must learn how to delegate tasks and decision-making effectively.

The CoachME Model: Trust & Delegation

In our work with leaders over the past decade, we've encountered delegation as a common leadership challenge across various industries. Whether in healthcare, manufacturing, or life sciences, the question of when and how to delegate remains complex. To tackle this issue, BECKETT MCINROY coaches have developed the CoachME Model, which focuses on two core dynamics essential for effective delegation: trust in people and trust in process. Trust in individuals is often discussed in the context of delegation, but trust in organisational processes is an equally critical yet frequently overlooked factor. Our consultants have observed that even the most dependable employees struggle to execute delegated tasks when the underlying processes are inconsistent or underdeveloped. Therefore, our framework encourages leaders to consider two crucial questions when faced with delegation decisions: "To what extent do I trust the people?" and "To what extent do I trust the process?" Many well-meaning and trustworthy individuals have failed in their delegated tasks due to inadequately developed processes.

Trust in people is built on a consistent track record of meeting goals, shared behavioural norms, and strong interpersonal relationships. It involves confidence in an individual's abilities across various domains: Can Mary deliver the results she promised? Does David treat team members with respect? Trust in process, on the other hand, relates to how well the organisational process functions, delivering consistent, predictable, and actionable outcomes: Does our R&D process consistently yield new, marketable products? Is our sales forecasting process accurate in its revenue predictions?

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These three “faces of drama” are placed on each point of an upside-down triangle: *The Drama Triangle illustrates how these roles perpetuate conflict rather than resolve it. Understanding the roles we play helps us break free from them and their short-term emotional rewards.*

Delegation Strategies

In our consulting work, we’ve seen that even well-intentioned and reliable individuals often fail to execute on delegated tasks due to underdeveloped processes. Thus, we suggest that the intersection of trust in people and trust in process should guide a leader’s delegation strategy. This article outlines a framework that provides leaders with three approaches to delegation, enabling them to match their strategy to the current level of trust in both people and process.

Balancing Trust in People and Process

As depicted in the graphic below, we have identified four delegation strategies based on whether trust in people and the organisational process is emerging or well-established: Empower, Engage, Educate, and Engineer.

A Framework for Delegation Decisions

This framework aids leaders in selecting the most effective delegation strategy based on the existing level of trust in both people and the organisational process. For instance, if trust in both people and process is still developing, the Engage approach is advisable: the leader delegates while closely supporting the team through challenges. Conversely, if trust in the process is still forming but trust in people is more established, the Engineer approach is appropriate: the leader and the delegate work together to refine the process.

1. Engage: Emerging Trust in Both Process and People

This scenario arises when trust in both people and process is just beginning and not yet solidified. Here, delegation can easily falter if not managed carefully.

Consider a scenario we encountered with a newly formed senior management team at a regional hospital. The new CEO brought together an interdisciplinary team of veteran leaders with deep expertise in their fields: a chief medical officer, a chief nurse officer, the CFO, and the chief operating officer. Despite their individual accomplishments, this team had never worked together under this new CEO, leading to emerging trust issues among team members.

Trust in organisational processes was also low, as the team had been assembled to improve the hospital's quality, safety, and efficacy ratings. Although the CEO attempted to delegate decision-making, she struggled to find the right balance between stepping back and staying involved. The team felt the CEO was constantly scrutinising their decisions, often second-guessing their approach. The CEO, justifiably concerned, worried that critical organisational systems and processes were failing.

This is undoubtedly a challenging situation for effective delegation, but not an uncommon one. It is often seen when a new leadership team is formed, a new leader joins an existing team, or organisational processes are uncertain or newly established. In such contexts, delegation requires a degree of engagement from the leader to manage the delegation effectively.

What does this look like in practice? It involves finding the right balance between allowing the employee to learn and experiment while staying close enough to provide support and address any issues. Although it may be tempting to let the team “run with it” independently, an engaged approach fosters collaboration on decisions. This not only allows the leader to better understand the team's capabilities but also helps the team work together to develop new processes and rectify previous shortcomings. Is this closely engaged approach permanent? Certainly not. But it helps both sides build trust through working together and gain a better understanding of the efficacy of new processes.

At the hospital, we assisted the team in creating joint processes from scratch and then observed them as they implemented these processes. This set the stage for both the leader and her team to build trust in processes and people.

2. Educate: Established Trust in Process, Emerging Trust in People

The second approach to delegation is necessary when there is high trust in the process but only emerging trust in the people involved. This scenario is common when individuals are promoted into new roles within the organisation or when a new hire is brought in and needs to learn the organisation's processes.

Recently, we worked with the CEO of a rapidly growing chemical manufacturing company who aimed to develop the next generation of leaders within the organisation. The CEO recognised that while the company had a history of success, continued growth and strong performance depended on emerging leaders effectively executing delegated tasks. The organisational processes were well-established and proven, but the managers were new. In this situation, it's akin to handing a novice driver the keys to a finely tuned car.

In this case, delegation should take the form of educating. Unlike the Engage scenario, the goal here is for the employee to learn the established process and gain confidence in their ability to carry it out. Over time, this will increase the leader's trust in the employee's capability. Delegation through educating means that the leader stays close enough to advise (rather than assist) the employee through the process steps and answer any questions along the way. This helps the leader build trust that the employee will eventually handle decisions independently.

At the chemical company, as the new managers demonstrated their ability to work within the established processes with positive outcomes, upper management gradually reduced their level of involvement, building confidence in entrusting the managers with more responsibilities.

3. Engineer: Established Trust in People, Emerging Trust in Process

The next delegation scenario arises when there is established trust in people but only emerging trust in the process. This situation is common in startups or during a turnaround when new or reengineered processes are being implemented within established teams. It's also frequent in larger companies with a culture of innovation centred around process improvement.

We encountered this scenario with a startup medical device company, where the founder struggled to delegate effectively to his sales executive. While there was strong trust between the founder and the sales lead (as they had built the company together), the organisation lacked a sales forecasting infrastructure. When the founder expected the sales lead to manage sales forecasting effectively, the sales lead felt set up for failure, as the process was underdeveloped. Upon reflection, it became clear that the friction wasn't due to a lack of trust in the sales executive's abilities or an attempt by the founder to micromanage. The real issue was the lack of trust in the process.

In such cases, the focus should be on engineering rather than delegation through engagement or education, to enable trusted employees to succeed with an underdeveloped process. The goal here is for the leader to support the employee in adapting the process to improve its functioning. This might involve the leader acting as a sounding board for the employee's proposed approaches or actively learning about the process flaws. Alternatively, the leader may need to step in to make a final decision and communicate the new process implementation to ensure it is adopted across the organisation.

Here, we see the clear distinctions between the different forms of delegation. Engineering around an underdeveloped process is quite different from educating a newer manager on an established process.

When there is trust in the individual but a lack of trust in a new or flawed process, open communication and clearly defined process milestones are crucial to effective delegation.

At the medical device startup, the founder and sales lead worked together to engineer an effective sales forecasting process. As the process began to deliver results, trust in the process grew. Over time, the sales executive felt empowered to manage related decisions and outputs successfully.

Empower: Established Trust in Process, Established Trust in People

Finally, we reach the scenario that provides the most favourable conditions for effective delegation: when trust in both people and process is well-established. This is the prototypical scenario that comes to mind when thinking about delegation: a leader has a long-time direct report who is trusted to “hold down the fort” when the leader is away.

In this case, delegation is best handled through empowerment. Full responsibility is assigned to a person who has the skills to manage a process the leader trusts to be effective. The individual is empowered to make decisions and adjustments as necessary, without fear that the leader will second-guess or retract their approach. This reflects an ideal hands-off approach to delegation that many leaders aspire to.

In short, empowerment without accountability risks damaging both the relationship and the ongoing effectiveness of the delegation scenario.

Conclusion

Successful delegation requires thoughtful consideration from leaders, as it's not a one-size-fits-all approach. The delegation style should vary based on the level of trust in both the people involved and the processes in place. Even the most skilled individuals can fail if the processes are flawed, and well-designed processes can be undermined by someone who is not adequately prepared. Although it may be challenging for leaders to discuss trust in either the process or a person's abilities, these conversations are essential for ensuring both individual and organisational success.

What are your key take-aways from this article?

What do you commit to practicing?

Thank You!

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