

Ali

Hi, Virginia. I'm so glad you're here. We can talk about delegation today.

Virginia Bauman:

Hi, Ali. I'm really excited for this topic. It's something that's been really important to me as a leader in my growth and it's very, very hard. So thanks for opening this conversation up and inviting me to talk about it.

Ali

Well, I'm really stoked because you have some fantastic viewpoints and lenses to which to view this. So I'm excited to offer that to the audience, our listening audience. And delegation comes up so often in coaching sessions. And there are so many reasons why we do it. And there are some pretty clear reasons why we don't.

Virginia Bauman

Yes, there are. I would love to actually just talk about that because I can speak to it and I'm sure you could. What are some reasons that you don't delegate or do?

Ali:

I have a really hard time delegating when...when I don't have like a full sense of what the to-do item is. Like, do I have a full, do I have a clear vision of what the outcome is? If not, it's not ready to talk. Like, it's not a hot potato that I'm ready to hand off to someone else.

Virginia Bauman:

Right, so ambiguity and lack of clarity might stop you from delegating? Mm-hmm.

Ali:

Yeah. And I think trust is huge, and I hear this all the time, but like, if I don't trust someone, like, I'm not giving you anything to do. Yeah.

Virginia Bauman:

Right, yeah, absolutely. And we could, I mean, trust is like a topic we've talked about a lot on this podcast, but it's something so fundamental to delegation that I think it's worth mentioning that as a discipline, going into where the trust is breaking down so that you can delegate is its own episode, is its own many episodes. But...

Ali:

Yeah, so true.

Virginia Bauman:

But there's, but yeah, trust can stop us.

Ali:

If I just break down the trust thing for, for a snippet here, just to the audience or the listeners can maybe check in on this on their own too. It's like, is the person that I could delegate this to, um, reliable? Are they competent? Um, do I, do I trust their, um, like sincerity around this? Like, is there, you know, can I trust that they're gonna deliver? Have they done this before? All those things.

Virginia Bauman:

Right. Yeah. I've been a recovering people pleaser, still am, for a long time. And so one of the reasons that sometimes I won't delegate or I'll get in my own way is I don't wanna impose on the other person. And as a leader, sometimes I see my role as like protecting people, which is not very helpful for their growth. It's kind of codependent. And I think that in learning how to delegate, I've had to...I've had to just trust that these people are fully fleshed out adults that will tell me no, that will tell me what they can't do, that will not feel that I am, you know, imposing on them. And that was a huge breakthrough for me in terms of trusting that I could delegate something to somebody. I also...

Ali:

That's really big.

Virginia Bauman:

I also sometimes don't delegate, again, for the lack of clarity, but sometimes it's just the ability to communicate the importance or the lack of importance. There is something about how we are relating to the positional power and how...how we can make sure that the person understands what we need them to do and why, and not just saying yes, because we're in a position of power over them. And I think that's kind of another dimension where if the communication cost is really high for the delegation, you're less likely to do it.

So what are some reasons that we do delegate?

Ali:

Efficiency, which is probably one of my number one values, or at least top five. Like I know in reality, it's all about scale and letting, trusting your people to do their best work. But I think for me, I do believe those things. And I see them happening in the small teams that I've worked with and built.

I think as a leader, you can't do all the things. It's about recognizing, recognizing like, okay, my energy is best put here on this pile of stuff or these top three items. And I know that this item needs to get done. I am not the best human to do this, nor is this like the highest and best use of my time or energy. I must therefore find the best human next to me.

Virginia Bauman:

Yeah.

Ali:

Or maybe a couple of layers down who can really take this and get it where it needs to go.

Virginia Bauman:

Yeah. So there's definitely a humility to the skill and recognizing talent and opportunity for others. I think related to that is the ability to give our teammates opportunities to grow and learn. And so there's the organizational scale and the scale of the work. And then there's the scale of the human that you're giving the task to. How are they actually scaling themselves and their skill sets?

There's also like our own learning in terms of vicarious learning and watching people do things well. And sort of giving ourselves the ability to appreciate and witness someone else on our team taking on a task that we know they can do and they can do. And they can do well.

There's reinforcing trust. So the flip side of the other trust coin is like, when delegation goes well and the communication runs smoothly and everyone's Aligned and it works, trust is reinforced and you kind of put those deposits in the bank. But I think at a certain point as a leader, this skill becomes such a huge part of a leader's time and effort that it can't be understated how important it is to not just think about delegation as a binary act, but to think about delegation as a process that we can be great at, a process that we can deepen and a discipline that allows us to be better leaders.

Ali:

Yeah, you know, there's a piece here that I think is really big. And it hit me again when you brought up the reinforcement of trust, right? When delegation goes well, it reinforces that trust channel. Like, oh my God, I have someone I can depend upon. I have someone I can toss these things to, and I know that they're going to be in good hands. And I know it's going to be delivered or shipped on time, whatever the outcome is.

Because I feel like, as a leader, your, the biggest hurdle to get over is, well, one of the big ones is, I think all of the other management aspects that are around what... I okay, I know delegation is good I know I need to hand this these things off, I kind of trust this person what happens then right if the commitment is broken or I'm somehow disappointed on the other end of this like it's about how do I manage myself in that moment based on our own personal history I'm sure we all bring in our own baggage around that, but it's also, how do I hold people accountable? So like accountability is, I think, you know, another layer of, or another piece of this, this larger management puzzle. But anyway, your, your statement around, you know, the, the reinforcing channel of trust really seemed to highlight that for me.

Virginia Bauman:

Yeah, it's an inherently cooperative, in-relationship skill. And so if we think about how we're good at delegation or how we want to be better at delegation, that's one piece. And then if we

think about another person's capacity for working with us in being delegated to, that's the other piece. And then there's the, how do we do it in relationship? What does the act look like? What does the communication pattern look like? And designing that explicitly with that person is a part of what I consider the breakdown of the skill.

And so if that's the case, if we accept that, we have to understand that delegation can be different with each individual on our team, because each person in relationship with us is a little bit different. Each person has a different capacity. Each person is better at different things. And so we have to delegate differently. And I will also say that there's a piece of this that relates to being an inclusive leader, building a culture that invites different styles of working and different styles of thinking and processing information.

I'll relate this back to my own experience as a leader. I actually had a rule that if Virginia tried to do something three times and failed three times, it was automatically delegated. And this was one of my...I kind of refer to it as the Ryan rule because Ryan suggested it and Ryan was somebody who was working very closely with me at the time.

And my colleague Ryan noticed that I had trouble delegating. And I also had trouble with overload because I was the CEO of a small team. We were fundraising. We were selling the company also at the same time. And there was just a lot going on.

And delegation formed as a compensatory strategy for how my brain worked, so that we could get more done as a group. And when we look at how differently we can use this skill to support others, we start to see a lot of opportunity for getting creative with delegation and letting us each do the parts that we need to do to use our time the best.

Virginia Bauman:

So when we train leaders at Reboot on delegation, and when I work with my clients on delegation, there's a simple mental model that I like to introduce, that I'd like to give our listeners.

Ali:

Let's do it.

Virginia Bauman:

And we have on one side, we have kind of a y-axis of a two by two matrix, and that is that you're delegating to, how ready are they for that task? And for the simplicity of this, I just want to say is the individual readiness high or low? And that's it. The task importance is the x-axis. And the task importance can be urgency. It can be value. But somehow, we have to evaluate how important is this task? How urgent, how mission critical is this task? and that can either be high or low. And so we get four quadrants around individual readiness and task importance.

And if we just plot the task on that two by two matrix, it's gonna fall into a place where we then

get to say, is the task importance high and the individual readiness high? If so, how do we want to delegate that? And if the task importance is low and the individual readiness is low, how do we want to delegate in that situation?

And I'll just kind of skip to, when we look at delegation, we want to identify opportunities for the person growing and learning, but we don't want to do that if the task importance is really high, right?

In that case, we want to monitor and support the person that we're delegating to, because anyone who's ever taken on a mission-critical task with no oversight knows that can be a little bit more stressful than it needs to be. So when we delegate something that's really high importance to someone who has really high individual readiness, we still want to support them, give them an extra set of eyes, and make sure that the task goes smoothly.

When the individual readiness is high and the task importance is low, take it, run with it. We don't need to necessarily monitor this, right? And that's a place to give the person more autonomy and to let go even more.

When the individual readiness is low and the task importance is low, that's a learning opportunity where we provide a high amount of support so that the person can actually learn from what we know, from our wisdom, or from someone else that is offering that support.

And then finally, when the individual readiness is low and the task importance is high, we do not delegate. So I think, yeah. And sometimes we don't have a choice, right? Rules like these frameworks are only as useful as we can apply them flexibly. But.

Ali:

That's fair, by the way. That's very fair.

Virginia Bauman:

I want people to understand that before we delegate, knowing where the person is and how important the person is, the task is, I'm gonna say that again, knowing where the individual readiness of the person is and how important the task is, that starts the process. So there's a little bit of inquiry, there's a little bit of going inward before we delegate. And that will give us a lot of clarity about how we delegate, what we ask for from the other person, and what we offer in terms of our time, energy, and capacity.

Ali:

Mm-hmm.

Virginia Bauman:

We also have a couple of questions, a few questions, four questions to be exact, that will help you do this inquiry. And I'll offer them one by one.

When you plan to delegate, first you wanna say, how will the work be handed off? In other words, how much context will you provide and what expectations do you want to set? That's the first step. And then you may want to ask yourself what questions will you ask to understand their individual readiness. Because just asking, how ready are you to do this task may give you something, but there's probably some more creativity that you can bring to assessing the individual's skill, capacity, reliability, so on and so forth. And each person is different.

Ali:

Yeah. What are some examples? I mean, I imagine it's gonna shift per situation, but like, just to give folks a little, I imagine our open, honest questions are gonna come in handy here.

Virginia Bauman:

They absolutely will. And I think, let's use a couple of those. If I were to pose, let's talk about this task. What is your best outcome if I were to ask you to get this task done in the next two weeks? And what's your worst outcome? Let's just find the bands of where this might land in the eyes of the person doing it from the perspective of the person who might be tasked.

What worries come up when you think about taking on this additional responsibility? What kind of value will completing this well create for the company? Team, org.

What might we need to deprioritize if you were to take this on. So, what might we need to do? What kinds of things in the past have you done that remind you of this? Tell me about those. How well does this land within a skill set that you feel strong in or weak in? How important is this test to you?

Ali:

Those are great.

Virginia Bauman:

I could keep going, but you can kind of hopefully get the idea that there's a temporal dimension to this. There's sort of like, how does it fit within the now, the time that you're going to be doing the task? And then there's a personal element. How does this fit with you and your role and capacity? And then there's an us. Like how will we know that it's going well, which we haven't quite gotten to, but the next, that kind of leads into the next question, which is when will we check in and provide feedback and how frequently? What's the communication plan around this? Because I think we often don't talk about that, but an element of completing something satisfactorily has to do with how we talk about it and how we communicate progress and how we narrate how things are going, or not going well.

Virginia Bauman:

And then the last question is, how will you connect this task to their goals and motivations? I think we've all been delegated to or all delegated, probably something that was unimportant to

us or the other person respectively. And while we may have to do that sometimes, it's better to link this to something that they care about or some responsibility that they're charged with, if at all possible. Because the meaning will allow them to draw motivation to get them through something hard.

Ali:

You know, there's a huge value in having these conversations ahead of time. You know, just from, I'm just thinking, I'm imagining, you know, someone with direct reports.

And it loops back again to that accountability piece that is so challenging for people as it relates to delegation and setting expectations. Because it's one thing for someone to delegate something. It's another thing for like, it's almost like delegation hygiene, right? It's like, how do we really set this up well? And make sure that folks are being held accountable. And what I really love about what you just articulated with that hearty set of questions is really having a conversation that is like consciously around all of the different parts of this project. And so that person can't just say, oh, yeah, I've got it. Don't worry. See you in two weeks. It's like, no, we've talked about these things. You know, we've talked ahead of time about what the goalposts are for what failure looks like or what not doing it well looks like and what what this person's vision or expectation of success on their own terms looks like, which is a really wonderful setting the stage, so to speak, for these subsequent conversations. And then also if you arrive at the end and things kind of went off the rails, it's like, all right, so what happened?

And then, this is a sidebar note, we don't have to take it anywhere, but...I feel like a huge piece of that accountability, and I think you and I had the accountability conversation actually on the podcast, but a huge piece of the accountability is, I find this in leaders, like they feel accountable when other people fail, and yet they don't push that accountability down when it's clear that the failure happened a degree away from them, right? One step away from them. They are not the ones that failed.

Virginia Bauman:

Right.

Ali:

So, you know, how then, you're setting up that conversation as a leader so that if things go off the rail or expectations aren't met, or if this is one thread of a consistent appearance of things not being met, recurrence of things not being met, you can then have necessary conversations to say, something's not working here.

Virginia Bauman:

Yes. And if I'll just speak to the tension that is coming up for me, that I've witnessed and experienced a lot. Okay, let's say you're delegating because you have a lack of capacity. And then we're saying, but you need to expend more capacity to have a conversation, map all this out, put it in a document, keep it on hand, make sure it's all clear, take the responsibility. Okay.

Obviously that's not going to always happen. So for a moment, I'd like to speak directly to the people who are being delegated to and say, you can use this the same way and you can help manage your leader that doesn't have the capacity to have this conversation initiated from their side. You can initiate it from yours. Manage up and ask these questions, right? Offer what you think it is and guide them through it. Because...

Ali:
Right.

Virginia Bauman:
There's a lot more that is in your hands than you think, and the leader will appreciate any effort to make things clearer if they're overloaded. I'm not saying take care of the leader, I'm saying take care of yourself, and that will take some stuff off of that leader.

So there are a lot of different ways that this skill can be perfected. So I think putting these two by two and putting these questions in a place where everybody can find them is something that we can link in the show notes, we can link on Medium, we can put in places where people can find them. Use these to clarify the expectations, use these to drive your own accountability, and delegation will run a little bit smoother.

Ali:
Yeah, I love it. Would you, you have a lot of lenses here that you kind of bring into this and I would love for you to speak to some of them because delegation, this skill is important for leaders for so many reasons. And as you just identified, knowing this, like having this as a framework is kind of essential if you're being managed, right? Because often we're not always managed well because our managers are like completely overloaded.

Virginia Bauman:
You mean they didn't go to manager school? They got promoted because they were good at being an individual contributor, and now all of a sudden they have all these people reporting to them. It's never happened. Mm-hmm.

Ali:
What? Do we have an episode on that? Anyway.

Virginia Bauman:
Leading from every position is what we're talking about, right?

Ali:
Yeah, exactly. Absolutely. Man, just that image alone. It's like my whole heart just like lifted up like to imagine a workspace in which everyone was leading from their position. It's like, wow, that would be buoyant.

Anyway, I feel you've lifted that up for folks who may not imagine themselves as being empowered or having enough agency, right, to make a difference, but here it is. But what are the other lenses and why and where is delegation is so important in leadership?

Virginia Bauman:

Well, I think I want to return to the neurodiversity inclusion piece. I want to return to the culture piece. If we think about building a culture of delegation, robust delegation and autonomy, then there's a mandate to not only do this well, but model it and give people tools so that it's accessible.

And when you start to look at it with that amount of depth, you start to see a lot of opportunity for growing the capacity of the org, not just yourself. If you have people advocating for doing delegation better, consistently from all places, then we start to really have a workplace that is flexible and we need that because we don't know what we're going to encounter each year. I think that's pretty clear at this point.

I also think that if we are being inclusive leaders, we want to think about how delegation can be both a challenge for certain people and a lifesaver at the same exact time, in the same exact act. And so I'm gonna speak from the ADHD perspective because that's where I come from and that's also where I help a lot of clients come from.

With ADHD, oftentimes we want to reinforce, supplement, and create supportive structures for our working memory, for our memory in general. And when we are delegated to, or we delegate to, someone else, we are taking a task and we are putting it either in our working memory we're trying to essentially take on something new and get it done within a certain amount of time, be tasked, focused, and work through it. Or we're trying to take something out of our mind and give it to someone else. Either way, we wanna put it down in writing somewhere so that we can refer back to it, so that we don't depend on our lossy brain and memory.

Right? Not that ADHD has any, you know, inherent challenge with long-term memory compared to other people, but it's just, it's incredibly helpful to think about this as a discipline is something that requires a record. It's a commitment. It's a commitment with lots of dimensions. And if we don't have a record of what we said and what we agreed upon, then there's likely unnecessary conflict that we might encounter in the future. And it's an act of service to yourself and to others, regardless of how their brain works, to put it in paper, to put it in writing, and to have it to refer back to. Possibly to manage to it, you know, having checklists, having things where we can have a source of truth. These are things that help everyone.

And it's hard to get to clarity. It's hard to be succinct, clear, and straightforward if we don't give ourselves the opportunity to put something down in writing.

Ali:

Amen, sister.

Virginia Bauman:

So I would just encourage us to think about delegation from as many lenses as we can to empower our team in a lot of different ways. And I wanna offer one more thing, which is, you may want to do a little bit of a diagnostic with your team to say, what things would you like delegated to you more?

What things would you like to take on that you would like to be delegated that would help you grow in a way that's important to you? What things would you like delegated less? If you don't know what people want, it's hard to give it to them. So sometimes you have to ask.

Virginia Bauman:

I would encourage people, if they want to learn more about delegation, to reach out to us. It's a topic we deal with a lot. And it's also something that I think unlocks a lot of value. So if this is something that you're struggling with or notice some tension around, pay attention to that and ask for help.

Ali:

I second all of that. Thank you so much.

Virginia Bauman:

Thanks for having me.