

Delegation is an important aspect of practice management. Proper delegation ensures efficiency, better distribution of work across a team, and opens the door to coaching and learning opportunities.



## 1. OVERCOME YOUR FEAR OF DELEGATION

- The following are examples of mindsets that may prevent you from delegating:
  - Fear of losing control: Delegating doesn't mean losing control – you are still the one ultimately responsible for the work.
  - It's easier and faster to do this myself: Recognize that while it takes an initial investment of time, once someone else is trained, it frees up your time to do other things.
  - Perfectionism: Lower the pressure on yourself and remember that doing everything yourself isn't always the best way to represent your client's interests.
- Consider the benefits of delegation: Freeing up your time, building your team's expertise, bringing more value for clients and enjoying collaborative practice.

## 2. EFFECTIVE DELEGATION TIPS



- Use this [Delegation Checklist](#).
- Plan ahead: Which tasks to delegate, to who and consider the desired deliverables. Consider the knowledge, skills and expertise of your team when delegating.
- Give detailed instructions:
  - Give the assignment context (e.g., how it fits into the big picture / how it will be used).
  - Be clear as to the desired deliverable (e.g., memo; oral report; etc.).
  - Resources and supports to consider.
  - When/whether to check-in and the assignment deadline.
  - Invite questions to ensure the person being assigned the task understands it.
- Supervise and review:
  - Be up front about how and when you will be reviewing work. Make sure that feedback is constructive, timely and fair.
  - Be realistic about expectations and keep an open mind: When someone else is doing the work, it may not be as you would have prepared it yourself. If you need to, tailor the work to meet your own style or a particular client's needs.
  - Confirm all filings: Filing errors lead to preventable claims. Review materials before they are filed, and proof of all filings (e.g., proof of service; confirmations; patent filings etc.).
- Avoid common delegation pitfalls: setting short deadlines, one-way delegation, only delegating "busy work," micromanaging, failing to treat your staff respectfully.



## 3. TIPS FOR RECEIVING DELEGATED WORK

- Use this [Delegation Checklist](#).
- Understand the task and deadline – if you aren't sure about something, ask!
- Manage expectations from the outset – be clear about competing priorities and any challenges so you can set a reasonable agreed upon timetable for completing the assignment.
- Follow up to receive feedback.



## 4. IMPLEMENTING EFFECTIVE DELEGATION

- Invite your team/colleagues to give feedback on what delegation methods work effectively.
- Explore additional technologies that can improve workflow. Check out practicePRO's "[Technology Products for Lawyers](#)" for more resources that can help.
- Provide training so everyone knows and understands the delegation processes.