

## **Ensure Success by Managing Delegated Tasks**

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Most workers need to communicate, track and manage delegated task items. It is particularly important for project managers as well as supervisors who not only have to manage their own tasks but also need to make sure their direct reports get things done, too.

Whoever is responsible and accountable for an action item or project should delegate clear guidelines on completing a task as well as follow-through with others to ensure success of an action or project.

The following are key points to remember for effective delegation that can be used with both small tasks and large projects:

Communicate desired results. Make sure to provide the overall goal and purpose of the task or project along with the intended benefits and consequences if the action is not performed correctly. Providing this information supports decision-making for the delegatee during the course of a task or project.

Provide clear guidelines. Provide clear and concise instructions either verbally or via e-mail. Be clear on timeframes, budget, resource allocation and expectations in completing the task or project. Although some workers feel providing clear guidelines can be perceived as micro-managing, it is important to define the boundaries and be clear on assignment details.

Determine communication plan. Identify others or resources to contact in case there are questions or issues that arise during the task. This saves others time when they get stuck to know exactly who to reach out to for assistance. Also, determine the method and frequency in which follow-up will occur. This will eliminate confusion as to who contacts whom when a task is completed.

Once actions have been delegated, then the delegator can use the functionality within productivity software to track and manage those delegated items. The following are three methods to track delegated action items using the Task function in Microsoft Outlook but can also be applied to other productivity software's such as Lotus Notes:

Create a category. Using categories in Outlook allows users to view e-mails or tasks assigned to a person in one group. In Outlook, there is only one category list to use for

all functions including Calendar, Email, Contacts and Tasks. First, create a new category by the person's name. Then, categorize e-mails or tasks that have been assigned to that person simply by right clicking on the task or e-mail item, choose Categorize and then click on the person's name. Once items are categorized you can view them by category by clicking on View/Arrange By/By Category. When having a one-on-one meeting follow-up items can be quickly accessed by using the category view.

Create one task item. Another option is to create one task for each direct report or delegatee. Name the subject line of the task item by the person's name. In the text and notes section of the task window, type in a listing of all action items with due dates. This can then be one location for all the delegated items for that person.

In Outlook 2007, you can also create a table from the Insert ribbon inside the notes section of the task list. This can make it easier to track actions by creating columns for the action item, due date, completion date, notes and status of each delegated action.

Create separate task folder. In Outlook, separate task folders can be created. Click on the task folder and go to File/New/Folder and the Create New Folder dialogue window will open. Enter in the name of the person and click OK. This will create a new separate sub-task folder by that person's name underneath the primary task folder. Then create individual task items under this new task folder for the delegated action items. All delegated task items are then organized under one task folder to make it easy to manage and track.

Proper delegation is important to ensure that others have the necessary information to do the task or project successfully. The upfront time of clear communication will save time in the future by eliminating the need to correct issues and problems because of poor communication.

Tracking delegated tasks and performing regular task follow-up is essential to ensure accountability for all individuals involved with a task or project. Make sure to create an easy and useable system of tracking and managing delegated tasks.

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