How Truly Effective Leaders Plan, Organize, and Delegate

There are some people who just seem to have it all together. Can you picture the type? Whether it's the CEO of a prestigious chemical company whose every decision increases the company's bottom line or the sales person down the hall who always delivers successful results on almost every sale, there just seems to be something about these individuals.

Their confidence, their unhurried presentations, their organizational skills, and the capacity of their calendars – what makes these leaders different? How are they able to so effectively accomplish their goals and priorities? We've been to the same time-manag ment workshops, read the same leadership and organizational bestsellers, so why do our management strategies usually fall short of the goal?

The answers are actually quite simple, yet often overlooked. The principles of effectively planning your projects, organizing your priorities, and delegating the proper way are absolutely crucial

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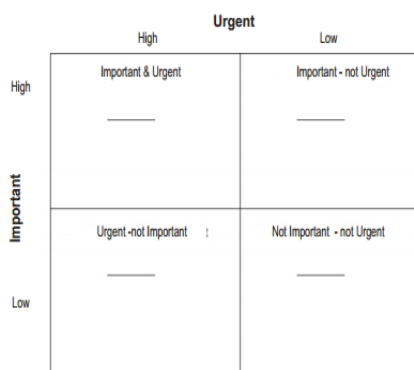
Fig 1. Priorities worksheet

to impacting your workflow and overall performance as a leader. Successful managers have a system – it doesn't just happen by accident.

Effective leaders understand how to plan, prioritize, and delegate key tasks following logical and powerfully prescribed methods. As a result, leaders who thoroughly understand and utilize these secrets can de-clutter their work day and maximize the value of their time in ways the rest of us can seemingly only dream about.

Additionally, they work for it – they don't just want it. Successful managers are proactive, rather than reactive. They watch out for the pitfalls so many others stumble into when delegating or arranging their calendar. The tasks that always seem to steal our limited time and burn through our day are minimized or completely absent from their daily routine – and by design. Effective leader ship doesn't just happen. There are crucial principles and doctrines that powerful leaders of today must master for smarter management, more efficient priority-setting, and delegation techniques that work like a charm. By implementing a few of these fundamental techniques, effective leadership can seem almost effortless.

Planning and organizing effectively

Effective front-line leaders manage their priorities, and then their priorities effectively manage their time.

They focus on achieving their priorities – the stuff that really matters, such as setting the organization's purpose, building and reinforcing a great culture, and leading and growing great people. They do not get caught in the trap of trying to cram more things into their already filled calendars.

Rather, they strategically stock their calendars with the right things that matter – achieving great results!

So is there a difference between planning and organizing? Yes! But these two activities are closely related.

Planning means setting priorities. The top priority for effective leaders is planning for the team – setting the priorities of your team. If you are in a place of leadership, then it falls on you to identify and articulate your company's goals. It is therefore imperative that you set the right priorities, for the right reasons, at the right time. Leaders must surround their teams with the appropriate environment to be successful. Be it the right tools, processes, or reporting relationships, the role of a truly effective leader is to ensure that the structure of the work leads toward fulfillment of the goals of the team and/or company.

So which one comes first – planning or organizing? You may have guessed organizing, right? Think again. Surprised? Well, let's think this through. How can you effectively create structure that ensures the right results unless you first set the right priorities? So it is planning that comes before organizing.

It is simple to illustrate the power of planning your priorities by merely drawing four boxes in a square. We will call this the priorities worksheet (Figure 1). Across the top axis you see the word "Urgent" with both a high and low rating. The vertical axis is the word "Important" also with a high and low rating.

Now ask yourself, which box of tasks would you focus on first? Rank each box in this chronological order, from #1 to #4. Write your answer inside each box, depending on what rank you would assign to that box. Then, to take this even further, think of 2-3 activities that you deal with on a somewhat regular basis. Make a list of 2-3 activities/priorities for each box.

Next, let's analyze the results. If you are like most leaders surveyed for this article, you probably ranked the upper left-hand box, the one that is both important and urgent, as your #1.

That's correct – it's a no brainer, really. If something is both important and urgent, obviously you should tend to that task immediately. Likewise, you probably ranked the lower right-hand box, the one that is not important or urgent, as your #4. Again, this is to be expected. If something is neither important nor urgent, then do not spend more, if any, of your valuable time on it. This goes without saying, but then again, even the best of us sometimes need a reminder.

The challenge then becomes which to rank as #2. Before proceeding, take a look at your choice for #2. Why did you choose it? There is quite a bit of confusion and even some debate on this matter, but it is quite possible that 75% of the prioritizing problems come down to this one box. Did you select the upper right-hand box that is important but not urgent or the lower left-hand box that is urgent but not important? Slightly more than half of managers rank the urgent but not important box as #2, because, whatever the activity, it is a time-sensitive item or it needs to be completed before moving into the upper right hand box of something important but not urgent.

But this is simply wrong. And there is a very good reason why. When you put urgency before importance, you put the clock in the driver's seat. You have chosen the clock over priority. A wise person once said that we should never manage our time, we should only manage our tasks. If you are constantly trying to beat the clock, you will find yourself always coming up short. After all, every time someone places a hard deadline on something, it takes precedence over important things that may not seem as urgent. And let's face it – almost everything seems urgent when it's first placed on your desk, doesn't it? All I would have to do as your boss or colleague is place a fast deadline on what I want you do to and you will do it – regardless of how important it is. Managing like this is a system for failure.

What kind of manager are you? The box in which you decide to live in will determine what kind of leader you will be.

Box #1: Important and Urgent

Managers who live in Box #1 are reactive managers. They tend to see everything as an emergency. Always in a perpetual state of stress, this professional will spread stress to others, and is often characterized by an "I need everything yesterday" approach, since they seldom take time to plan ahead and prioritize.

Box #2: Important, Not Urgent

Managers who tend to live in Box #2 are proactive managers and typically far more productive, less stressed, and more in control of themselves and their environment. They understand that investing just a few moments into planning now will save hours of stress, headaches, and wasted energy later. Although they still have some Box #1 items, proactive managers have far fewer urgent activities than others. They are therefore less stressed and more productive – and so are the people around them! Truly effective leaders live here in Box #2.

Box #3: Urgent, Not Important

Managers who live in Box #3 are clock managers. They are ruled by the clock – not by priorities. They fool themselves into thinking that activity equals productivity. They fail to grasp that a little planning reduces headaches, instead thinking that happiness lies somewhere at the bottom of the never-diminishing stack on their desk.

Box #4: Not Urgent, Not Important

Managers who live here are typically fired managers – they are often demoted or replaced rapidly. The way to become a Box #2 Manager – a proactive manager – is simple. Block out 10-20 minutes every day to do nothing but plan. And then stick to that plan! And decide TODAY to prioritize everything you do. If you don't proactively assign a box for each task, it will either slip through the proverbial cracks or it will become a top priority by default – and then it's back to being a clock manager rather than a proactive priority manager. You're in charge. You set the priorities – for today as well as next week and even next year.

Delegating effectively

So you've filled in your four boxes, you now know how to arrange your priorities, so that you stay in charge of your time, and not your time in charge of you. Your tasks are effectively and properly assigned a priority, and guess what – there's still too much to do and not enough time to do it. What's next? Obviously, delegation is the next step.

Perhaps you have experience with delegation – after all, you are a leader. But there is so much complexity within that one word, that it is simply unfair to not detail the how and the when to delegate. Anyone can delegate, but there are certain principles and strategies that truly effective delegators use to make it actually work like a thing of beauty. There are two major reasons front-line leaders are not typically successful in their delegation practices.

First, they do not clearly understand the concept of delegation, and second, they do not understand how to delegate. Before we discuss the most powerful and effective methods of delegation, we must first understand the most common delegation pitfalls and mistakes made by ineffective leaders. Only after learning how not to delegate can a successful manager properly understand and implement the strategies for effective and empowering delegation. After all, it does no good to remove a priority from your calendar only to have to address the mess created further down the delegation chain due to improperly applying these principles.

Pitfall #1: Over-delegation

Ineffective leaders overload their team with delegated duties they cannot successfully complete. Remember that we tend to delegate tasks only to our peak performers, which will quickly turn a top-producing star into a de-motivated employee.

Pitfall #2: Under-delegation

Under-delegation occurs when ineffective delegators keep too many tasks for themselves – afraid to trust any projects to those below them. This means, they are spinning their wheels, while underutilizing the skills, strengths, and potential of their team. So develop an attitude that you willingly desire to grow your team, to delegate proper tasks, and give yourself more free time for your own personal and professional growth.

Pitfall #3: No delegation

It is only a matter of time for managers that do not effectively delegate to lose their best employees (from lack of growth), burn themselves out (from over work), and/ or be viewed by top managers as a marginal contributor (from lack of delegation).

Pitfall #4: The "It's faster if I do to it myself" pitfall

This is extremely dangerous, and one of the more common pitfalls of ineffective managers. It implies that only the manager has the skill, knowledge,

or ability to handle the situation – that they are indispensable! Not only will this send a no-confidence message to your team, but it will also leave you tired, stressed, and pondering why you can't find good people. This is also why hiring smart is so important!

Pitfall #5: Collecting "monkeys"

A "monkey" is any task that requires action. If you decide to make the next move on a task, then you have the monkey; if your employee decides to make the next move, then they have the monkey. Wellmeaning, but highly ineffective leaders often go on "monkey roundups" taking on dozens of tasks given to them by their employees all in the name of being a "good" manager. Instead, kindly return all monkeys (tasks) that are not in your job description to their rightful owners. Let the employee who owns that task again have the honor of performing that task. Second, announce that you will no longer go on monkey roundups or accept monkeys from others, but that you are there to coach, lead, train, and support everyone to achieve great results. In other words, everyone has a job to do (their own "monkeys"), and everyone should do their own job. This will contribute the greatest gain to the group as a whole, working as an effective unit, rather than looking like a top-heavy circus. Understanding these pitfalls is crucial to keeping an eye out for improvement in your leadership style and vision. But now it's time to analyze the delegation practices of highly effective leaders, to understand what makes them so successful and their performance seem so effortless. But if you're expecting a highly protected secret, you might be surprised.

Good delegation is really not a mystery. It is simply a systematic application of four very fundamental steps.

Step 1: Choose the Right Task

The first step in effective delegation is to choose the task. Ask yourself which tasks you can and cannot delegate. In most cases, you should never delegate such core supervisory responsibilities

as performance appraisals, reprimands, performance counseling sessions, terminations, or confidential staff issues. Although not a comprehensive list, you must think carefully about those duties that only you should and must perform as a leader, and therefore are not eligible for delegation. After that, all other duties are open for delegation consideration.

Step 2: Choose the Right Person

The second step to effective delegation and a streamlined schedule is to choose the right person. So what should you consider in choosing the right person?

The primary things to consider are:
• The employee's current skill level.
• The employee's current motivation.
• Double delegation.
• Short-term and long-term fit.

Step 3: Communicate the Delegation

• Review the results to be achieved. For example,
you may say that you want to improve customer response time by 10% and would therefore like to delegate your current duty of completing the customer feedback report to the employee. By framing the delegation in key results to be achieved, the employee then clearly understands the importance of the task in achieving great results.

• Define the task. After describing the key results, discuss the specific series of actions required to successfully complete the task. In the above example, you may give the employee an actual customer feedback report and show them each of the key steps to properly completing it. Ensure the employee fully understands the scope and nature of the task.

• Set performance parameters. Now is the time to share how the employee will be measured for their performance. Consider setting standards for quality, quantity, time, and cost.

• Provide appropriate direction and support. Create a training plan with the employee to help them learn the skills needed to succeed in the task. Also consider the type and amount of support materials or

resources they will need as well as how best to give them total access to these materials. Ask what other support they may need including access to you for questions, further training, and moral support.

• Assign an appropriate initiative level. Employees should understand the level of initiative they are authorized for or expected to put forth on a certain task. Whether this is instructions for them to wait until told what to do, ask what to do, recommend what to do, act and report immediately, or act and report routinely, the employee should always be on the same page with you and your priorities.

Step 4: Checkpoints

The final step in effective delegation is to set checkpoints to ensure progress. Also, pre-establish a solid coaching and feedback plan within your checkpoints in delegation. Be ready to help your employee whenever you notice their performance is slipping. Encourage them to contact you with issues, concerns, or training needs. Remember, your job is not to do their job but to help them learn to do theirs better. Finally, within your checkpoints, schedule celebrations of their progress and success. Keep the momentum high for task completion through appropriate recognition, rewards, incentives, or even a sincere "Thank You".

Conclusion

In the search for quick mixes and secret formulas, the journey to effective and potent leadership is often surprisingly simple. But simplicity does not excuse the lack of attention to detail. The principles of effortless and effective priority management, organization, and delegation are fundamental, but they are nevertheless vital to grasp. Great leaders are not born, and great leadership is no accident. By applying a few simple techniques for evaluating priorities, by paying attention to organization principles, and by sidestepping the most common delegation pitfalls, managers can become mentors, and leaders can become visionaries. These principles are essential to a powerful, relevant, and effective philosophy of leadership – and therefore anyone can rise to the occasion and truly lead effectively