

## TOP TIPS

# Mindful Delegation

The aim of the MBC is to drive behavioural change and these top tips have been designed to encourage a best practice approach to collaboration instruction and delegation. In order to embed mindful delegation across the business requires commitment from both the delegator and the delegatee.



## Delegator

- Clearly explain the context, purpose, intended recipient of the work.
- Try to negotiate rather than impose deadlines and give rationale.
- Discuss upfront preferred ways of working including working patterns/core hours and taking into account planned holidays.
- Consider following up with an email outlining agreed requirements, issues to consider, timetable for responding etc. (or ask the fee-earner to confirm to you in writing what has been delegated)
- Create 'to do lists' for trainees and more junior members of the team (consider asking your PA to set up a 'Team' within 'Microsoft Teams' to enable this for different matters/deals)
- Consider allocating a 'project manager' for cross-divisional deals (fee-earner or paralegal).
- Be mindful that you may not be the only person delegating to a particular fee-earner and they may have conflicting priorities – speak to other delegators to agree priorities, especially for juniors.

- Issue instructions ASAP and don't 'sit' on the task.
- Be transparent and prompt on timetable changes - especially where deadlines are altered.
- Consider if your deadline is 'hard' or 'soft' e.g. is the deadline imposed by a client or will the output be used at a later date?
- Avoid using ambiguous or vague terms such as 'fairly urgent'.
- Be available/approachable so that team members can ask any questions/raise any issues to do with the work.
- Consider and agree the appropriate level of supervision/input required for the delegatee.
- Schedule regular check-ins to ensure everyone is on track (involve anyone working on the deal).
- Keep people updated as to the outcome of work performed – was the client happy with the advice received; did the client act on it or did the matter not proceed etc.
- Avoid delegating the same type of work time and again, instead try to create learning opportunities.
- Use capacity trackers in a meaningful way to ensure fair and transparent delegation.
- Check attendees' availability when scheduling a meeting and try to avoid scheduling meetings outside working hours and over lunchtime.
- Use the timed email function to avoid sending emails outside of business hours.
- Use the email subject title to indicate level or urgency.
- Seek and provide feedback.
- Recognise good work and give praise.
- Identify team members who may benefit from project management training.



## Delegatee

- Be inquisitive about the time and resource required to deliver a task - there may be more complexity to a task than meets the eye.
- Feel empowered to negotiate deadlines, particularly where not achievable or realistic – escalate if necessary.
- Ensure you build in time for scheduled annual leave/holidays or non-working days.
- Ask for clarification if you are unclear about any aspect of the task.
- Raise any concerns with workloads, deadlines or competing priorities as soon as possible.
- If you feel that delegation could be improved feedback at an appropriate time with suggested improvements.