

DELEGATE OR DIE

THE SECRET TO MARGINS, RISK
MINIMISATION AND MOTIVATION FOR
PROFESSIONAL SERVICES

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THE CONSULTANT'S CONSULTANT

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"Surround yourself with the best people you can find, delegate authority, and don't interfere."

– Ronald Reagan

Chapter 1

THE DELEGATION CHALLENGE

One of the biggest challenges for leaders in consulting firms is to avoid becoming a ‘bottleneck’ to growth. In a typical consulting firm, roles should be split into:

- ❖ Grinders (grind the work out) – typically consultants and senior consultants
- ❖ Minders (ensure the work is done well) – team leaders and managers
- ❖ Finders (find the work) – directors and partners

At the top of the firm, if you are not spending the majority of your time finding work through account development and business development, you are being overpaid and firm margins are suffering.

Contrary to what many believe, however, delegation isn’t just about the senior leadership team – it’s a mindset that should be embedded in the whole culture of the firm. Your most junior consultant should also be thinking about what they can delegate to off-shore cheaper labour (think Upwork), to AI or to automation. A firm that is sufficiently delegated, is not just highly efficient and highly profitable but will also have high levels of motivation as people are not doing work that is below their pay grade.

Yet, delegation is something that boutiques are particularly bad at. The late professor John Hunt reported that only 30% of managers believe they can delegate well.

Unsurprisingly, only slightly more were considered good delegators by their teams.

In this eBook I reflect on the importance of delegation by boutique leaders, why it can be difficult, and how to do it – both practically, and in terms of mindset. This is doubly important to me, not only because I hate to see waste in a consultancy but also because I live with one foot in the world of academia – possibly the most inefficiently run sector on the planet.



*"Deciding what not to do is as important as
deciding what to do."*

– Steve Jobs

Chapter 2

WHY DO YOU NEED TO DELEGATE?

You don't have time. None of us do. In a recent survey I sent to consultancy partners, 'not having enough time' was the top reason they had for not doing more business development. Between undertaking performance reviews, mentoring juniors, chasing timesheets, correcting work, and managing unhappy clients, partners often struggle to do what they are meant to do best – sell.

This can be even worse if you're the founder. As you need to add to the mix all the external facing, leadership, strategic and communication activities that makes a great boutique, well.... great.

One answer to this (as seems commonplace at big firms) is simply to work harder. But although 70-hour weeks are doable when you're a McKinsey Engagement Manager on \$250k per year, in most firms over-worked individuals will either move elsewhere or have a breakdown.

Micromanagement decreases morale and productivity. It inhibits learning and increases employee turnover. Many consultants join boutiques to get away from the bureaucracy of the large firms so they can grow in a smaller company. If they are doing below their pay grade and getting micromanaged by a senior – an ambitious and able consultant isn't likely to hang around.

Delegation is also an essential part of your training and

development effort. Supported delegation is part of mentoring which allows juniors to grow successfully. More capable juniors means better work which should mean higher fees.

Delegation is, therefore, also crucial to profit. If you are doing the work that a junior should be doing then, in effect, the firm is paying too much for that piece of work. If your firm is not hitting 20% EBITDA, then lack of delegation is a likely culprit.



"The best executive is the one who has sense enough to pick good people to do what he wants done, and self-restraint to keep from meddling with them while they do it."

– Theodore Roosevelt

Chapter 3

THE DELEGATION MINDSET

Many CEOs and other leaders I meet tell me that they can't delegate because the juniors don't do as good a job. To which I respond *'did you always perform at the level you do?'* (to which, the answer is always no). Then I ask *'did you make any mistakes on the journey to your level of performance?'* (to which the answer is always yes!).

People don't do good jobs by magic. Delegation, training, mentoring, and strong IP and quality management systems will all but guarantee higher quality work and more motivated staff.

Whilst I often find that junior competence is a factor in the reluctance to delegate, I usually find that there are more influential, but often unacknowledged, factors under the surface. Ones which leaders are often reluctant to admit.

If you wish to adopt a delegation mindset as a leader, here's what you need to relearn:



*"The art of leadership is saying no, not saying yes.
It is very easy to say yes."*

– Tony Blair

1. Let Go of the Control Mindset

A lot of people see knowledge and control as power. This mentality can propel you to not delegate as you want to establish your control. You may also feel resistance towards delegation if you think you can do the work better than anyone else. However, this thought process will be responsible for blocking growth and innovation in your consultancy. In fact, according to a [Gallup study](#), CEOs who are good at delegating generate 33% more revenue than those who aren't.

To break out from this control mindset, go back to the basics — think about why you hired your team members. If you want to do your staff's job, why do you pay them?

2. Shift to 'Achieving Mindset' From 'Doing Mindset'

Consulting leaders, especially in technical consultancies, have often emerged from delivery roles and often find it hard to let go of the 'doing'. This is not (always) because they are control freaks, but more commonly because either they actively enjoy delivery more than they do management (and certainly business development!) or because they feel that the juniors won't do as good a job.

Leaders with a technical and delivery mindset will often assume that the work needs to be 100% right. Unfortunately, this isn't always possible with tight timescales and budgets. Often 80/20 is your friend and is closer to what they client actually paid for.

As a leader, you need to understand that your job is to ensure the work delivery is of the highest quality and standard, regardless of who works on it. If you delegate, you'll get more time to unlock your potential as a leader and build relationships with clients and identify new growth opportunities.



"Don't let the perfect be the enemy of the good."

– Voltaire Remove

3. Make Peace with Average in the Beginning

One of the reasons why consultants step away from delegation is because they feel it would compromise their service quality. It's true — you must recognize that the delegated work won't tick-mark all the quality checks in the beginning. However, it shouldn't be an excuse to look over the shoulders of juniors and jump in when things go wrong.

Instead, understand that your juniors would need consistent monitoring, coaching, and training to meet project deadlines and quality standards. It doesn't mean you should over-explain the task or go too much into detail about how the work should be done. Just explain the basics and believe in how capable your people are.

Strong IP will help remove some of the risks here. Don't just provide a wall of written instructions. Tools such as Loom mean that you can record what you are doing on your screen and it will generate Standard Operating Procedures in a tenth of the time that you would write it yourself.

Strong knowledge management systems such as MethodGrid can provide IP templates that support not only your work, but also that of your clients.



*"You can do anything, but not everything."
– David Allen*

4. Remove Productivity Blockers

Do you know that workers [spend an average of 41% of their time](#) on activities that offer little personal satisfaction and could be handled completely by others?

These redundant tasks are your productivity blockers. They prevent you from indulging in high-value tasks that can drive business growth. If you delegate your daily work tasks to people more appropriate for handling them, they'll result in an efficient workflow.

5. Explore AI, Automation and Outsourcing

I encourage all my clients to explore the possibilities of AI and automation for the whole firm. Even basic access to ChatGPT can cut out a few hours of work a week. If you add in some low code / no code automation or some specialist apps like Discy or Fyxxer, you might do a lot better. The best way to approach this is through experimentation.

I would also urge you to explore which parts of your processes can be outsourced cheaper overseas. At its most simple level, this might mean getting PowerPoints produced on Fiverr or having a virtual assistant in the Philippines. At a more complex level, you might shift from the task to the process, and explore how automation, AI and humans might interact to undertake end-to-end tasks more effectively.

When automation and AI fails, perhaps outsourcing might work. Places such as South Africa or Portugal operate in the same time zone as the UK but have much cheaper rates for highly skilled people. Although I still write all of my marketing content, its distribution is now entirely managed by a firm in Ukraine. Indeed, I have no employees at all in my firm – all of my marketing, admin and back office is managed by off-shored contractors.

Chapter 4

WHAT TO DELEGATE?

Now that you know why delegation can be useful, it's time to master the art of it. How do you identify which tasks you should offload? Let's figure out by auditing your boutique consultancy's task into six T's:

1. Tiny

Tasks like setting appointments, adding meetings to calendars, or booking tickets are small. It feels like they take seconds to be done, and thus, you end up taking them. However, when they add up, they eat a lot of time. Do not put a second thought before delegating them.

Additionally, if you have larger tasks at hand, break them down into smaller tasks, and delegate them. Breaking big tasks into more manageable pieces allows you to handle the workload better.

2. Tedious

Are you spending an hour daily on data entry or documentation? If yes, repetitive and relatively simple tasks are not the best use of your time. They don't require any decision-making skills, high-level expertise, or management acumen. So, it's best to let someone else from the team handle them.

3. Time-Consuming

Important and complex tasks take up a lot of time. While it may look like you need to sit on them from the

beginning, you can also step in at the final stages of the task completion.

For example, conducting market research for a new client is a time-consuming and complex process. From identifying the target market to conducting a competitive analysis to gathering data on consumer behavior, it involves several crucial steps. In such situations, you don't need to be present from the beginning; delegate the tasks to the right individuals and keep giving direction on the next steps. In the end, all you have to do is review and approve it.

Teachable

If you have tasks that can be easily taught to others, don't waste your time doing them yourself. Even if they seem complicated at first, translate them into a sub-task system, add quality checks and standards, and take them for final approval.

4. Terrible At

If you're running a boutique consultancy, it's not vital you'll be good at every task. While many tasks will fall into your strength pool, you may also fall short of other skills.

So, when you feel unequipped to complete a task, delegate it to team members who are far more experienced and skilled than you. It's the only way to get exceptional results.

5. Time-Sensitive

You must come across several sets of work that are time-sensitive but clash with other priorities. The easiest and most practical solution here is to delegate such tasks to employees who have the bandwidth to complete them quickly and efficiently. It will help you to meet deadlines and satisfy clients' needs and demands.

Pro Tip: Don't delegate everything at once! Assess the priority and urgency of the tasks and step into delegation gradually. You can also begin by first assigning tasks to your team members that are less important and then move on to critical tasks.

Figure 1 Prioritise your tasks using the Eisenhower Matrix

	Urgent	Not Urgent
Important	Do	Plan & Initiate
Not Important	Delegate	Delete

Chapter 5

TO WHOM TO DELEGATE TASKS?

Once you figure out what tasks to delegate, the next step is to know to whom you should assign those tasks. Ideally, you will have job descriptions which clearly identify which tasks different roles do, and do not, have.

In addition, once you employ over 40 people, you should also have career pathways which track what development each person needs. Ideally, each person should have an 'easy', 'medium, and 'difficult' exposure to a task in that order. This can be planned through your people system and should be supported with IP, training and mentoring.

Start by reviewing the past performance of your junior employees. It will help you recognize their areas of improvement, strengths, and weaknesses. As a result, you can offer additional training or support to help them complete the delegated tasks.

It's also crucial to assess the motivation of your staff so that you can tailor the delegated tasks to their personal development needs. It will keep them engaged and motivated. Host one-on-one meetings, performance reviews, or regular check-ins to conclude.

Chapter 6

HOW TO HANDLE DELEGATION COMMUNICATION?

Delegation is not a one-off task, it's a process! How you manage the handover will have a fair impact on how successful it is.

1. Frame Delegation into Promotion, Development, and Challenge

There are different ways to delegate a task. However, the way you communicate it to your junior staff makes a difference.

One of the many expectations you have from your staff while delegating is that they feel motivated to perform the task to the best of their abilities. To implement this, it's crucial to make your junior team members feel like the delegated task is an opportunity for them. If they see it as a medium to learn, grow, and contribute to the organization, they are likely to be more invested.

2. Set Clear Objectives to Reduce Misunderstandings

Steven Sinofsky, a former Microsoft executive, said that, "when you delegate work to the members of the team, your job is to clearly frame success and describe the objectives."

Organisational behaviour research shows us that people are much more likely to perform better if they know the

bigger goal to which they are striving. If you want a successful delegation process, discuss the objectives and explain the purpose of delegation, expectations, and benefits to your juniors. It's best to provide detailed instructions and outline expectations to ensure there are no misunderstandings later.

3. Establish Tracking Guidelines and Communication / Support Channels

As I said above, delegating a task is only the beginning.

To ensure the success of the task, you need to be available so your juniors can seek assistance. Moreover, make systematic plans to set deadlines, get progress updates, and have regular check-ins with the juniors.

4. Clarify Working Preferences to Avoid 'Upward Delegation' and Micromanagement

Once you have delegated a task, try to minimize the possibilities of upward delegation and micromanagement. Whether it's a junior seeking constant approval from the manager or the manager getting over-involved in the deliverables, such situations are a put-off in delegating.

To avoid this, establish working preferences from the beginning. Clearly state the expectations upfront and your level of preferred involvement so that the junior can feel more confident. Initially, juniors may not feel confident in completing new tasks, but try to avoid helping them, instead point them to others who have done it before. Then, stop pointing them.....

5. Monitoring Progress

Critical evaluation and assessment of the delegated task are

vital to maintaining work quality. As a consultant manager, you should establish clear metrics and regularly track work progress against these metrics. It will help you to offer feedback, suggestions, and support to your juniors.

Figure 2 Typical partner-level prioritisation

	Urgent	Not Urgent
Important	<ul style="list-style-type: none">• Key accounts• Crisis mngt.• Negotiation• Delivery review	<ul style="list-style-type: none">• Business dev.• New service initiation• Mentoring & mngt.• Initiate content• Learning
Not Important	<ul style="list-style-type: none">• Content creation• Content distribution• Administration• Minor clients	<ul style="list-style-type: none">• Micromanaging• Unproductive work

Chapter 7

THE KEY TO DELEGATION MANAGEMENT

Delegation is one of the hardest management skills to put into practice. If you want to become a better leader in your boutique consultancy, it's time you embrace it. Here are a few strategies you can use to make the process of delegation easier.

1. Give Constructive Feedback and Address Skills Gaps

If you want your junior employees to get better at delegated jobs, you need to adopt a feedback system.

First off, set clear expectations and objectives for the delegated task. While the junior staff is working on it, check their progress at comfortable intervals and provide regular and implementable feedback. Your actionable suggestions will be beneficial for the team members to address their skill gaps and improve their work performance.

2. Identify the Root Cause of Mistakes/Substandard Work

Do not expect the delegated work to be flawless and with no errors on the first attempt. However, when you spot mistakes or substandard work, make it a point to identify the root cause.

Adopt a proactive approach. If you see mistakes, address them, understand their cause, evaluate the employee's skills

and capabilities, and provide required feedback and training to avoid repetitions.

3. Correct Mistakes Sensitively and With Tact

If you spot a mistake, refrain from blaming or criticising. Provide them constructive feedback so that they can learn from their mistakes. You can also collaborate and work together with your junior employee next time to identify precise problems and offer practical solutions.

Just as being transparent with your employees about their mistakes is crucial, praising them for their successful tasks and excellence is also important.

Chapter 8

AND FINALLY....

Some questions for you to answer

- ❖ Are you adding value where only YOU can add value?
- ❖ Are you encouraging your reports to think about THEIR succession management?
- ❖ Do you have a system to regularly assess and encourage your succession management?
- ❖ Do you know your psychological blockers for enabling succession management? How can you overcome them?

A workplace culture that embraces delegation is bound to have more productivity, satisfaction, and growth.

Good luck!!

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