THE TEAM TRAINING INSTITUTE

EFFECTIVE DELEGATION

Delegation: The act of entrusting another person with a task, responsibility, or authority to act on your behalf.

Why Delegation Doesn't Work

- Vague expectations & hidden standards
- "handle it...and do it like I do"
- Lack of clarity of ownership at each step
- Feedback loops are missing

5 Levels of Delegation

- Tell: Do exactly this. (They receive exact steps from you.)
- Teach: Do this alongside me. (You coach as they do.)
- Consult: Bring me options. (They propose, you help to decide.)
- Agree: You decide. Update me on milestones. (They decide, you align.)
- Own: You decide. You own the results. (I will only see the outcome.)

Which of these delegation levels are you currently using in your practice? _____

Doctor Delegation Exercise

- Perform this exercise at a team meeting.
- Identify and list all tasks that are currently being done by the doctor that legally could be done by another member of the team.
- Create this list for the owner doctor and for any other doctors in the practice.
- Discuss why each list item is still being completed by a doctor and what training or skill development would be required to delegate the task.

Task Triage Exercise

- Each team member writes a list of recurring tasks they are currently responsible for. For each task, choose the risk of delegation (low, medium, high), a person to whom you could delegate each task, and the current experience or competence level of that person (low, medium, high).
- As you place the items in a grid, with the competence level of the person, you can then decide how to move forward...Tell, Teach, Consult, Agree, Own.

Delegation provides opportunities for team members to take on additional responsibilities, develop their skills, and continue their growth while freeing up doctors time and increasing productivity and efficiency.

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The RACI model is a Responsibility Assignment Matrix that clarifies project roles by defining who is Responsible, Accountable, Consulted, and Informed for each task or decision.



How RACI Model Can Help with Delegation

- Overcome delegators fear of complete removal from process
- Overcome team fears of being left on their own
- Identify what can/should be delegated & to whom
- Identify communication milestones and expected outcomes

What's one task you will delegate this week to provide the opportunity for greatness to another member of your team? _____

What is one workflow or project you could use the RACI Model to boost your confidence in getting it across the finish line? _____

What is one metric you could monitor and review with your team to measure the effectiveness of doctor delegation? _____