

Delegating Upward

By BNET Editorial

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Good delegation is an art. It keeps work flowing efficiently and helps employees learn new skills and advance in their professions. Poor delegation reduces motivation and often makes people feel exploited. No delegation at all will lead to bottlenecks and prevents organizational growth.

As a rule, delegation moves downward from the executive to division and department heads, managers, and so forth. However, sometimes employees need to delegate upward, for instance when there is a need for capital or human resources, when expert knowledge is required, or when there are political barriers to be overcome. As an employee, you may also find that on some occasions you need an extra boost of authority to resolve a situation that has run aground. Sometimes, you will simply have too much to do and need some assistance.

Most often, the person doing the delegating has the authority. But when you are trying to delegate to your boss, you will need to find another way to motivate him or her to take responsibility on your behalf.

What You Need to Know

My boss keeps giving me more and more to do. I can't possibly achieve everything and I will need to pass some things back up the line. How can I do this?

You're going to have to give your boss some feedback on how the extra work is affecting your productivity. Be clear about what you can and cannot do. For instance, you could say, "When you ask me to add another task to my workload, it forces me to cut back on something else. What's going to happen is that I won't be able to deliver anything on time. How would you like me to re-prioritize my work?" Then go over your various functions with him or her, explaining how much time each item takes. Using this process, you should be able to convince your boss that your workload really is too heavy.

My boss wants me to spend my time on a pet project. I don't have time to work on this *and* complete my usual tasks. How can I get her to take responsibility for the activity that she obviously thinks is a priority and give myself space to complete my own work?

Try to put yourself in your boss's shoes and see things from her perspective. This may help you to see the reason for her priorities. Take control of the situation by asking for her rationale, and communicate your worries about the consequences of putting your efforts in this area. You could say

something like, “I don’t have the time I need to work on this and complete all my other responsibilities. I’m concerned that this will affect the way our department is perceived, so I’d like to pass some things back to you on this occasion.”

I get a negative response whenever I try to delegate upward to my boss. What do I do now?

There could be a number of reasons why your boss would say “no” to you initially. He or she may have been caught off guard and not know exactly what you are requesting. Given time, you may get a positive response. On the other hand, you may have misunderstood his motivations, conducted the conversation clumsily, or sounded too demanding. Try to remain assertive and repeat your request using different language and different reasoning.

How can I convince my boss that I need help without appearing incompetent?

Obviously you don’t want to give your boss the impression that you can’t do your job so focus on the *outcome*, rather than the *process*. It is not the “how” that is in question, just the end result. Try saying something like, “I’m happy to be responsible for getting this job done, but if it needs to be completed by a certain date, I will need help, either from you or from others you can assign to assist me.”

My current position doesn’t give me the authority to do what is needed to get my job done. When I need more power behind me, how can I delegate a task to my manager?

Present the case rationally to your boss, outlining the reasons for your request and emphasizing the advantages if they assist you with your task. Most people like to feel that they are needed, especially when it serves their purposes. You might mention, for instance, that a job well done will reflect positively on the department as a whole.

What to Do

Get to Know What Drives Your Boss

If you are stretched—or stressed—and overburdened by tasks and deadlines, or if you do not have the resources or political clout you need to get things done, you may need to practice the art of

upward delegation. Your boss is very likely to resist such attempts, as he or she probably has a full workload too. Most bosses consider delegating upward to go against the grain, yet it is sometimes unavoidable. So, think about how you can overcome this potential resistance by tapping into your boss's values and motivations.

Most people seek achievement and recognition in order to build their self-esteem. They may meet this need through power over people or through relationships with people; but either way, knowing what motivates them gives you a means of tapping into the secret of upward delegation. If your boss is motivated by *power*, he or she will seek status, visibility, and credibility. This may take the form of political maneuvering and making sure that they are in the right place at the right time to raise their profile and further their personal cause. If he or she is motivated by *relationships*, they may spend a lot of time with their colleagues, chatting around the coffee machine, and planning retreats and team-building activities that mix business with fun. Although these are at two extremes of the "power/relationship" continuum, if you try to imagine your boss somewhere on this scale, you will probably find that he or she is closer to one extreme than the other. This will show you how, by taking responsibility for a task on your behalf, they will benefit with a payoff that helps them to satisfy one of their motivations.

Use Friendly Persuasion

If taking on your delegated responsibility helps your boss to move closer to achieving his or her aspirations, then they are more likely to assist you. There must be something in it for them, and knowing your boss's motivations can only help you with this. The psychologist Abraham Maslow's "hierarchy of needs" suggests that, once our basic needs for shelter, food, and warmth have been met, we are motivated by recognition and achievement. Assuming that your boss has met these basic needs, you can be sure that he or she will be aiming for recognition and achievement. What's important for you to know is that you can assist with this outcome, either implicitly or explicitly, through delegating upward.

Follow the step-by-step process described below:

- *Consider your supervisor's motivations*—or whoever it is that you are delegating to. Have you observed whether they put relationships in front of everything else, or if they prefer the thrill of wielding power over others? This will give you a clue about how to initiate your discussion.
- *Create the right atmosphere*. Try not to rush in with emotional complaints about the stress and strain you are under, or attempt to rid yourself of a burdensome task too quickly. Arrange for a meeting so that you'll have the time you need to explain the situation calmly and clearly.
- *Speak clearly and listen carefully*. Start by using assertive language. For example, you could say, "I will need your support with this project and would like you to..." or "If you want me to complete my task by Friday, you will need to help me by..." Taking responsibility for your thoughts and feelings allows you to be more powerful in your communication. Instead of being theoretical and abstract, you are presenting yourself as a mere mortal who sometimes needs help. It is harder to dismiss a human being than it is to dismiss an idea! Also, listen carefully to what your boss is saying rather than rehearse your objections as she or he is speaking. This way you will have

all the relevant information you need to react coherently and credibly. If you're not sure how to respond, say that you will think over their objections or counter-proposals and get back to them. The art of giving feedback is helpful in this sort of exchange. If you hear them say "I will do..." you know that they have agreed to take on the delegated task or activity, or at least some of it.

- *Suggest what's in it for them.* Outline the benefits to them if they take on the task. Use phrases like "I can see how this will improve our department's position..." and "I know that you place a great deal of value in..." Speak to their motivations and aspirations. You could even try bartering: "If you can do this for me, I will be happy to do something for you." Again, bear in mind their aspirations and where they invest their self-esteem. Be prepared to negotiate; think of a contingency plan that would still take some pressure off and give you a sense of satisfaction and achievement.
- *Make an appointment to meet again.* This makes your expectations clear and sets boundaries around the timing. You might like to frame it as a developmental discussion for yourself: "I'd like to meet with you again so we can explore how the project is going and I can learn from you."
- *Thank them for their efforts.* Everyone likes recognition, and in this case they have really put themselves out for you, both in terms of time and in how they may be perceived by their colleagues.

Remain Clear and Confident

Try to be as upbeat and positive as possible when you have this conversation with your manager or supervisor. You have every right to ask for what you need and, as long as it is in the best interests of the organization, you should have every confidence in its outcome. If you go into the discussion feeling fearful or awkward, you will undermine your ability to communicate clearly—and clarity and confidence are what you are aiming for.

What to Avoid

You Lose Your Cool

It is tempting to offload your frustrations on your boss or colleagues when you are stressed and up against tight deadlines with too much to do. You may even be tempted to issue threats about what you will do if some pressure isn't taken off of you. But instead of gaining sympathy and support from management, all you are doing is creating a view that you are a complainer and unable to cope. Try to check your urge to vent your frustration. Then step back and focus on your priorities and the cost of not getting things done. If any of these are critical to your job or the business at hand, take them to your boss with a proposed solution—which may include delegating some of your responsibilities

upward. Your chances of success are much better if you can articulate your case reasonably and calmly.

You Assume That You and Your Boss Have the Same Agenda

This happens a lot. Your boss has different pressures from the ones you have to deal with, and it's easy to miscalculate where his or her concerns and priorities lie. Try to familiarize yourself with their situation before you attempt to delegate upward. Remember your audience and try to see things from their perspective. It is essential to make a meaningful connection with them so that they will want to help you.

You Expect To Fail

Believing that your boss will be unwilling or unable to help you can become a self-fulfilling prophecy. Make sure you put forward your delegation strategy with certainty and assume that you will be successful. Prepare thoroughly beforehand, and present yourself calmly and thoughtfully. It may be helpful to practice with a trusted colleague or friend. Brief your partner on the situation and ask him or her to respond to your request with an assortment of challenges. Once you have heard yourself go through the process, you will have a databank of practical experience to draw from.

Where to Learn More

Books:

Useem, Michael. *Leading Up: How to Lead Your Boss So You Both Win*. Crown Business, 2003.

Cohen, Allan, and David I. Bradford. *Influence Without Authority*. Wiley, 2004.

Web Sites:

BusinessBalls.com: www.businessballs.com

Chapter highlights from a book by Allan Cohen and David Bradford:
www.babsoninsight.com/contentmgr/showdetails.php/id/820

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