

Art of Communication: Effective Delegation

By Jay Sullivan

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Business professionals change titles every two or three years. Along with those changes, they generally receive training on how to work effectively in their new roles. At law firms, our roles change more subtly. We may refer to associates as junior, mid-level or senior, but our business cards don't change, our clients may not see the change (except on fee statements) and our firms may not acknowledge the changes with training to give us the necessary skills for our new roles.

One day, after years of practicing law, you will suddenly realize you spend more time reviewing the work of others than generating your own. Rather than simply cranking out billable hours, you now are expected to build the bench strength of the firm by developing other attorneys - while continuing to crank out billable hours. Congratulations: You are now part of management.

But how do you delegate assignments effectively so that you get what you want from colleagues while building your credibility as both an experienced attorney and as someone who is interested in developing the professional skills of others? The answer is effective delegation.

Following are six steps to effectively delegating an assignment:

1. State the big picture.

Let a junior associate know her assignment fits into the greater scheme of things. How does her role fit into the larger matter for the client? (i.e., Our client, Acme, is being investigated by the state board of insurance. They have hired us to compile records to respond to a request for information.) How does the matter fit into the firm's relationships with the client? (This is our first opportunity to work with Acme. They are considering us for a large transaction they anticipate down the road.) How does the project fit into the client's overall business objective? (Acme is aiming to become the key insurance provider in the state and needs a smooth working relationship with regulators to make that happen.)

We all want our work to matter. Much of what we do as attorneys is isolating. Helping a junior lawyer understand how she is part of the greater effort is important for keeping her contributing at her best. The same is true of paralegals and secretaries, who are indispensable to our work.

2. Identify the specific assignment and determine expectations.

Clearly state exactly what you want the junior associate to do. (I need you to review three

years of records looking for X.) Then find out how you can help the associate do her job well. (Have you done this type of project before? What was the context?) Attempt to fully understand what the associate thinks the job entails. If she has never worked on a similar project, you will have much more explaining to do and you will have to more closely manage her work.

3. Explain the roles of others.

Help the associate know who else is working on different elements of the project. This will not only give her a sense that her work impacts others, but will help her know her available resources. (This is partner Garcia's client. Senior associate Murphy is pulling everything together. I am overseeing all of the due diligence, and paralegal Johnson is coordinating the logistics. I am getting on a plane tomorrow and will be in Memphis for the next two weeks. I will respond to any e-mails quickly, but go to Murphy or Johnson if you need a quick response to something.)

4. Explain the reasons for selecting the individual, especially the potential benefits to her.

If the assignment is a good opportunity for the associate to develop a new skill set, let her know. But, of course, don't lie or over promise. Because many delegated assignments do not involve huge learning curves or opportunities to work on an exciting case, don't be afraid to acknowledge those facts while stressing your appreciation for the associate's part in this larger project. (I know you just returned from a four week document review in Peoria, and that this is more of the same. But this is an important part of the matter and I need someone with experience doing this and who appreciates how important it is that this is done correctly.)

5. Explain the next steps.

Be clear as to how you want the associate to begin work on the assignment and what work-product you expect to see at the end. (Begin by contacting Johnson. She knows where all of the boxes are and can explain how they are organized. Johnson has already prepared a spreadsheet of the boxes. I need you to fill in the title of each document you review and whether you saw any evidence of X.) And give clear deadlines and discuss potential hindrances to meeting those goals. (E-mail me the finished spreadsheet by Tuesday. Is there anything on your plate? Anything that would keep you from meeting this deadline?)

If you delegate an assignment on Monday and it's due on Friday, don't wait until Thursday to check on the associate's progress. Ask for periodic progress reports. (Send me an e-mail by 10 a.m. Wednesday to let me know how many documents have been reviewed, whether you have uncovered anything, and what questions you have about the process.)

6. Summarize what you want the associate to do.

If it is not a significant assignment, have the associate summarize it so you both know you are clear as to what needs to happen. You can avoid sounding patronizing if you phrase the request appropriately. (Just so we are both clear as to what you will be doing, please repeat back to me the scope of the project and your next steps.)

Remember, you have a much better chance of receiving work-product that meets your needs if you delegate appropriately at the start.

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