

# Why Can't I Delegate?

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*How to use strategic planning to  
empower your team*

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**W**ith all of the talk about “super delegates” at the Democratic convention, you might be asking yourself, “*Where can I find some of those delegates to help me do the work around here?*”

If you've ever felt forced to wear too many hats, then you know how frustrating it is to feel like you can't delegate work to any one else. You find yourself torn. You should be spending your time on high-value activities, where you have the opportunity to contribute the most. Instead, you seem to get lost in the constant effort to stay on top of the other “low-value” tasks, activities, and responsibilities of being in business. Eventually you aren't paying attention to the important work any more. If this continues long enough, you might eventually give in to exhaustion and hand over the reigns completely.

*“The leaders who work most effectively, it seems to me, never say ‘I’. And that’s not because they have trained themselves not to say ‘I’. They don’t think ‘I’. They think ‘we’; they think ‘team’. They understand their job to be to make the team function. They accept responsibility and don’t sidestep it, but ‘we’ gets the credit.... This is what creates trust, what enables you to get the task done.”*

**Peter Drucker**

### **Top 10 signs that you might need to delegate more**

1. Your “vacation” is really a code name for a change of venue for you and your laptop. You spend your trip on the phone or connected by computer and you can list the differences between the lunch and dinner room service menus.
2. You manually sign every check that goes out.
3. Team meetings only happen when you are available.
4. Departments don't have budgets or approved spending limits. They have to come to you for approval of individual expenditures.
5. Your family has resorted to placing photos of you all over the house so they can remember what you look like.
6. Your office includes a cot and three changes of clothes.
7. Fewer than three people (including you) see a copy of the financial statement each month.
8. You haven't attended a conference, educational session, or networking meeting in the last three months.
9. You think the price of a gallon of gas is somewhere around \$3.00.
10. You are the first one in the office and the last one to leave—every day.

## A Symptom of a Bigger Problem

Sometimes a failure to delegate is the result of having tried and failed for one reason or another. But often, it is just the result of a belief that you carry around.

Ask yourself, *"Why do I continue to carry so much of the work?"*

If the answer is, *"I have the wrong people,"* you need to start defining the roles and skills that you need on your team and begin looking for the people to fill them. But if you take a good look at the people on your team, you will probably discover that the majority of them are capable, talented, and eager to contribute to the success of your company. So it's unlikely you've got the wrong people.

So why is it, then, that you can't or don't delegate more work? Is it possible that your vision and dreams for the business exist only in your head? If so, your team has no choice but to depend on you for direction and accountability, as they have nothing to measure against.

You don't have a people issue—you have a process issue. And in fact, your difficulty delegating could be a symptom of a larger problem. The good news? It's a lot easier to fix the process than the people.

## Step One? Step Back

Often, when the leader feels overworked, his team feels undervalued, so it's a good time to step back and take a fresh look.

In order to delegate, you have to get your processes—or tactics—down. And in order to do that, you have to step

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

**Theodore Roosevelt**

*"Hire the best. Pay them fairly. Communicate frequently. Provide challenges and rewards. Believe in them. Get out of their way—they'll knock your socks off."*

**Mary Ann Allison in  
"Managing Up, Managing Down"**

back and create or revisit your strategic plan. If you already have one, great—you're ready to share the load. But if you've got a delegation problem, our guess is that you either don't have a strategic plan or you haven't shared it with your team.

A good strategic plan states a clear objective over a defined amount of time. It includes success measurements and a picture of what the outcome will look like. How will you know when you have achieved your objective? What will other people see when you reach the destination? A good plan is easy to follow and contains as few words as possible to convey the meaning.

## **Strategic Planning 101**

As the starting point for leading your team and your company, an effective strategic plan should not be created solely by an owner and then imposed on the team. Rather, it is created by the very team of people who will be bringing the plan to life. A good plan can be used to make decisions, and can be the basis for determining if new ideas are in keeping with overall company goals.

Once you've got some answers to these questions, you're ready to start writing your plan. Most strategic plans include the following components:

- Vision Statement
- Mission Statement
- Critical Success Factors
- Strategies & Actions
- Prioritized Implementation Schedule

### **Start the strategic planning process by gathering your team and asking the following questions in an effort to arrive at a consensus:**

- What is it that we provide?
- What are we good at?
- What is our business?
- What do we offer that our competitors cannot provide?
- What kind of image do we want to convey?
- What do we want to be known for?
- What does our ideal customer look like?
- What do we care about?
- How do we want our customers, suppliers and distributors to feel about us?
- Where do we want to be in five years?

## Vision Statement

The vision usually starts with the owner. Where is the company going? What is the owner trying to accomplish? Why did he get involved in this business? What is the passion that drives him to come to work everyday? Everyone on the team should be able to repeat the owner's story without thinking. It should be part of the fiber of your organization. And that story becomes the corporate vision.

Have the team talk about the elements of the owner's story that translate into the culture of the company. What are the talismans of that culture that are reflected in your physical environment? What do employees strive to achieve every day?

One of the reasons people are drawn to work for one company instead of another during the initial hiring interview is that sense of belonging they feel. Often, it's not something they can readily describe. It is a sense of shared beliefs that becomes apparent as they talk to more and more people in a given company. In order to create a strategic plan, it therefore makes sense to try to capture a sense of those core values that are shared among the members of your team.

Gather your team together and have them write their responses to questions like these:

- What was it that caused you to join this organization?
- What did you sense when we were interviewing you?
- What does it feel like now?
- How would you like it to feel in 5 years?

The patterns that emerge will help you identify the values

*"If you want to build a ship, don't drum up people together to collect wood and don't assign them tasks and work, but rather teach them to long for the endless immensity of the sea."*

**Antoine de Saint-Exupery**

that make your company different from others like it. With the owner's story and employees' values in mind, write your vision statement down along with any supporting actions that you want to take in achieving your vision. And share it with everyone in the company. Make the path clear so that everyone can head in the right direction and accomplish measurable milestones along the way. If you have ever gotten directions using Google's map feature, you know how valuable it is to have a list of steps to follow with milestones and checkpoints along the way. Knowing that it is 1.2 miles between the left turn onto Highway 29 and the right turn on Adams Street is very helpful.

With a clearly stated vision, everyone on your team will have a basis for making their own decisions. If a problem arises, they can consider alternative solutions based on whether or not they support the vision. Without a stated vision, employees will need to seek out the keeper of the vision—namely you—for help solving problems and making everyday decisions.

## Mission Statement

While the vision is long-range, conceptual and captures emotions, the mission should be immediate and actionable. It becomes the yardstick for measuring whether new ideas are appropriate or not. How do you want to treat your customers and employees? What problem are you solving with your product or services?

### Shop Talk



Meet John Alimento, a very successful and overworked winery owner in Napa Valley. He's a fictional character—but his challenges and opportunities will ring true for many winery owners.

Alimento's vision is—and has always been—to offer a great bottle of wine that reflects a taste of Italy and can be shared from one generation to the next. He wants it to become a family tradition and wants to build a winery that embodies that feeling of being in his grandmother's Italian kitchen. In her kitchen, there was always plenty of food and plenty of laughter. The mood was warm and glowing and he always felt safe there. Her greatest pleasure was sharing a great bottle of wine with friends and family.

### Shop Talk



Alimento and his team's mission is to offer a great-tasting wine at an affordable price. They want their wine to be the beverage of choice for momentous family occasions. And they want every visitor to Alimento's winery to feel like a member of the family.

## Critical Success Factors

Once you have the vision and mission defined, you need to picture the outward manifestations of those ideas. How will the concepts impact your actions? What steps must be taken in order to achieve the vision and mission you have previously articulated? These factors will change from year to year but should always be considered in light of your vision and mission statement.

*“A good manager knows that there is more than one way to skin a cat. A great manager can convince the cat that it is necessary.”*

**Gene Perret**

*“First and foremost as a manager or supervisor... your job is to get things done through other people... You are paid to manage, not perform every task.”*

**Mary Ann Allison, VP Citicorp, 1984**

### Shop Talk



If Alimento's vision is to have a winery that shares a taste of Italy with every customer, and his company's mission is to make every visitor feel like a member of the family, these might be some of the winery's critical success factors in the first year:

- Be the number one identified winery for affluent families with children.
- Be viewed as a place of respite from their parents' busy day.
- Get in front of new parents when they have their first child.
- Systemize the way the company stores and uses personal information like birthdays and special family events so it can stay in touch with the family through all of its milestones.

## Strategies and Actions

Once you have defined the critical success factors that will ultimately determine your success or failure, you then identify the drivers that impact the outcomes. From there, you create measurements that let you see where you stand. Once the measurements are in place, you can use them to build reward systems that motivate your employees. Now it's easy to create the action steps that logically follow.

### Shop Talk



A critical success factor for Alimento and his team:  
 Be the number one winery for affluent families with children.

Now Alimento and his team members need to determine how they will measure success, define numerical targets, and then work together to define an action program.

OBJECTIVE	MEASUREMENT	TARGET	ACTION PROGRAM
Number one winery for families	<ul style="list-style-type: none"> <li>Market share</li> <li>Awareness</li> <li>Presence at high profile family venues</li> </ul>	<ul style="list-style-type: none"> <li>51% market share for parents</li> <li>Increase awareness by 2% in the new year</li> <li>Increase representation at family venues by 10%</li> </ul>	<ul style="list-style-type: none"> <li>Review advertising budget for family publications</li> <li>Review website for new ways to connect</li> <li>Investigate family cruise lines for placement opportunities</li> </ul>

## Prioritized Implementation Schedule

Once you have identified all of the activities needed, the team should then go through the list and determine the order in which they should be accomplished. You should consider available budget and relative ease of implementation, as well as the potential impact of each individual activity. You might want to rank the activities in order of cost/benefit ratio if there are no interdependencies between them. Be sure to set goals for intermediate measurement points so that everyone on your team can see progress is being made along the way.

*“Your company’s profitability depends on how well your people consistently perform specific activities.”*

**Edi Osborne, Founder, Mentor Plus**

*“Never tell people how to do things. Tell them what to do and they will surprise you with their ingenuity.”*

**General George Patton**

### Shop Talk



These are the three activities Alimento and his team identified:

- Review advertising budget for family publications.
- Review website for new ways to connect.
- Investigate family cruise lines for placement opportunities.

Now, they might want to start by investigating those family cruise lines. His team can plan to contact four cruise lines by the end of October. By talking to travel agents, they can learn more about his target audience. They can find out what their statistics are showing. Is family travel up or down? This activity can be done immediately with little or no additional investment on Alimento’s part. And it can be done by phone immediately.

## Summary

You will be amazed at the insights you gain when you have a chance to step back from those day-to-day activities that are consuming your brain. When you take the long view of your goals, objectives, and strategies, you begin to see patterns and approaches that aren't normally obvious. You begin to separate the useful activities from those that just eat up your time, and you begin to be selective about the projects you undertake. By having a team that knows where to focus and how to tell when they have achieved their desired goals, you will have more time to think and act strategically and will ultimately add more value to your organization.

*“Good supervision is the art of getting average people to do superior work.”*

Anonymous

*“In order for me to look good, everybody around me has to look good.”*

Doris Drury—Chair, Federal Reserve Bank,  
Kansas City

## About BDCo

BDCo is an accounting and advisory firm with deep knowledge about the wine and hospitality industries, and a passion for putting people first. Grounded in knowledge of financial measurements, the firm's services help companies achieve their goals and objectives by increasing the knowledge, awareness and understanding of everyone on their team.

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