

Title:

Wait Before You Delegate

Word Count:

881

Summary:

Whenever we talk to others about being overwhelmed, one of the first suggestions we hear is "Delegate!" Well, if you've come to realize that it is something that you definitely need to do, take the steps to do it right.

Keywords:

loan processing, mortgage training, mortgage education, mortgage broker

Article Body:

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Whenever we talk to others about being overwhelmed, one of the first suggestions we hear is "Delegate!" Well, if you've come to realize that it is something that you definitely need to do, take the steps to do it right. All too often, tasks are delegated with built-in obstacles that make it hard or impossible for the individual to complete the delegated assignment. In the end, everyone is filled with frustration.

Here are a few suggestions to consider before delegating your next task or project:

- Select the right person for the job
- Provide adequate training for the individual
- Empower them with the authority and resources to complete the job

Let's explore each of these points in further detail:

Select the right person for the job - This is essential. It is absolutely pointless to select a problem employee to handle a high priority project. Consider both the individual's personal attributes and professional skills. A pleasant disposition is more important for a job that requires a lot of interaction than it is for a job that requires data entry and document review. The job should not conflict with the individual's primary function in your company. Here's an example of a properly delegated task:

SITUATION: Barb needs her best processor, San, to assist with new employee

orientation and training. However, San already has a larger pipeline than anyone on the team. Additionally, San's husband began taking a college course recently and needs her to be home on time to care for the children. RESOLUTION: Barb met with San to see how she feels about the responsibility. San says she's excited about the opportunity to share her knowledge. With that in mind, Barb reviews San's pipeline to find 10 loans that are relatively simple and divides them among the remaining processors. Additionally, to make sure that the orientation and training project does not conflict with San's personal life, Barb puts her on the agenda early in the morning on her husband's school day so that she can leave on time.

Provide adequate training for the individual—Some delegated projects don't pan out because they were given with insufficient instruction or support. Forget about doing the crash-course training just before you delegate an assignment. It might get you through the moment but does little to inspire your team members. It is important to cross-train your staff on as many things as possible from day one. You won't have the time or patience to do so in your time of need. It's far easier to review or refresh on a topic that you've already exposed your team member to. Here's an example:

SITUATION: Kevin was hired to process loans for clients who served the sub-prime niche. He had no experience with other loans. When Kevin was trained, he was required to shadow a processor who handled other niches including A-paper and government loans. RESULT: When other processors were scheduled off, Kevin was able to step in right away to help with their pipeline. Kevin enjoyed the change of pace and increased his skills with each vacation fill-in.

Empower them with the authority and resources to complete the job—Don't delegate without providing the tools to get the job done. Nothing is worse than being on-hold with a delegated project because you weren't given what you need. Alert everyone who needs to know that the project is being handled by "XX" and that they can feel free to interact with that person just as they would with you. This notification can be done by phone or e-mail. Additionally, provide as much supporting information for the project as possible including phone numbers, faxes, and exhibits. Provide for the necessary authorizations as far ahead as possible. If capital is required for the project, make sure you communicate how and when funds can be accessed. Here's an example:

SITUATION: Donna has been asked to meet with her company's regional partners while they are in town. She will give them an overview of the operation during the business day and give them a brief tour of the city after work. Donna is concerned because they are in the midst of their busiest time. Additionally, Donna expressed some concern about having limited financial resources and

waiting on an expense account reimbursement. SOLUTION: Donna's workspace was relocated to a quieter area in the office. This would allow her to interact with the guests with fewer distractions. There was not enough time to add Donna to the corporate account so a prepaid Visa was obtained for her to use to cover meals and transportation for the guests. The visit went off without a hitch.

A few other important things to remember when delegating are:

- Communicate the deadline for the project
- Make yourself available for follow-up inquiries
- Give praise and recognition for a job well-done

These are just a few examples where a task was delegated the right way and handled successfully. Don't be afraid to let go. Delegating a task will free up your time for more revenue generating activities. And, the challenge of a delegated assignment may be just what it takes to give the star on your team a glow.