



When you follow several simple rules, delegation is an invaluable business tool. It promotes efficiency by ensuring that work is handled at the appropriate level, by people with the right experience and expertise. However, poor delegation will often lead to claims, complaints and fee-earner disaffection.

Common problems

- Delegating a matter to someone who does not have the requisite skill or knowledge to deal with it. This is asking for trouble unless you can guarantee that the recipient will receive close supervision from someone who does have the relevant skill or expertise
- Delegating problem files. This will only exacerbate the problem and de-motivate fee-earners (see our factsheet on Delay)
- Delegating a matter on which urgent action is required where you have been guilty of delay. Delegate another matter instead to free yourself up to deal with the urgent matter
- Delegating a matter to someone who does not have the time to deal with it. If the recipient is already under time pressure on other matters, increasing their workload is a bad solution. If there is no spare capacity elsewhere in the firm, you need to look at recruiting extra manpower or declining new work

Ensure that your firm has a written delegation policy. This should be agreed by the management and implemented throughout the firm. Include it in your office quality manual.

Allocation of work

- The supervisor should determine the allocation of work within the team
- Who is the best person to handle the matter? Factors to consider include:
 - workloads
 - fee-earner experience
 - fee-earner seniority
 - specialist skills
 - knowledge of client
 - knowledge of locality
 - fee-earner availability
- If the fee-earner is part of another team, discuss the job with their supervisor before it is delegated

Specialist skills

- Use delegation to promote and develop specialist skills
- If a client provides repeat business, try to allocate it to the same fee-earners. This will promote knowledge of the client's affairs and preferred methods of working. It will strengthen the relationship and increase efficiency

Handover procedure

- Ensure that the fee-earner is fully briefed. Sending a very short email will be ineffective in all but the most straightforward of matters
- When delegating, highlight the time scales, meeting dates and other key dates and ensure that they are diarised by the recipient. Insert key dates in your diary, too
- Highlight the important factors for the job
- Tell the client who will have conduct of the file. Do the terms of engagement need to be revised? Advise the client of any change to charge out rates
- Manage the client's expectations. The client may expect you to retain overall control. Make sure the fee-earner frequently updates you. What level of involvement do you want in decision making? Tell the fee-earner
- Ensure that the client is not charged for any duplicated time
- Keep a record of matters you have delegated and take responsibility yourself for monitoring progress
- Comply fully with supervision procedures (see our factsheet on Supervision)
- If appropriate, notify the change in fee-earner to your accounts department

Teamworking

- If the firm is instructed on a large matter, delegate parts of the job. This increases efficiency and provides cost savings to the client
- Advise the client of the team members and their respective charge out rates in your terms of engagement
- Use team meetings to update the team on the bigger picture and to discuss individual progress. This helps motivate and promote better understanding
- If possible, involve all the team in client meetings
- Remember to communicate any changes of instructions to the entire team
- Ensure that one supervisor has overall responsibility for leading and co-ordinating the work