

Mastering the Art of Delegation

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If there were just one word to describe the typical urgent care operator, that word would be...*busy*. If you have more tasks to accomplish than hours in the day, then it's time you learn how to delegate. While you have spent long hard hours building a team and defining procedures to assure your practice runs smoothly, if you don't take some tasks off your plate, your center's day-to-day operations will suffer and you will be unable to continue performing to your staff and patients' expectations.

If you are spending too much of your time in the "whirlwind" of day-to-day operations, you don't have time to focus on growing your business. Rather, your mindset is more likely one of "survival" and "get through the day." Think about all of the projects you could focus on if you had a little help. You'd finally be able to tackle your list of "When I have time, I'll..."

When it comes to delegation—assuming you have someone to delegate to—your concerns are legitimate:

- I *really have* to do it myself.
- I don't *have time* to teach someone.
- There's no one that can do it *as well* as I can.
- If you want something done right, you have to *do it yourself*.

Well, take a look back at your career path. Somewhere along the way someone gave you additional responsibilities that empowered you to become more valuable to your organization. Then, consider all of the advantages your urgent care center will gain when you begin to develop your staff. The more responsibilities team members can master, the more you will be able to promote from within, and the more you promote from within, the higher your employee retention rate will be. People inherently want to be trusted and challenged so delegation can lead to a more cohesive team, more loyal employees, and a stronger culture in your center.

To get an idea of the things you can delegate, every day for a week or two write down everything you do. Once you have a list, consider which tasks are within capabilities of your direct reports. You can delegate entire tasks or "parts" of tasks. For example—if you screen job applicant resumes, perform phone interviews, and conduct the in-person interviews, delegate the resume screening and phone interviews, but continue to do the in-person interviews.

There are of course some tasks that you will be unable to delegate such as annual reviews, disciplinary actions, and meetings with the board, owners or investors. But some of the categories of work most easily delegated include:

- Administrative, clerical, data entry, transcription
 - Supply inventory, ordering and invoice reconciliation
 - Timecard review and payroll entry
 - Deposits and cash reconciliation
 - Facility maintenance
- General customer service
 - Medical record requests, lab/test results, billing inquiries
 - Follow-up on patient complaints
- Sales and marketing
- Interviewing and hiring
- Training

Choosing the right person to delegate a task is invaluable. Talk with your staff to find out who is interested in taking on additional responsibility and to learn the areas of your operation that interest them. This conversation alone provides a

valuable assessment—revealing that your staff in aggregate has more ambition than you probably imagined but also identifying which specific team members are the most ambitious. You may also be surprised to learn that your staff already knows how to do some of the things on your plate, so why shouldn't they be helping you?

Once you've identified which staff members want to be developed and the areas that interest them, find tasks that are appropriate for their skills and that can be clearly defined. If the task you're taking off your plate can be described as "I do whatever I feel is right in the moment," this is a task you'll need to keep as it is not easily documented into a step-by-step process. Let's not forget, delegation is a growth opportunity for you too as your training, development, and leadership skills will increase by managing others.

When you know what tasks you can delegate to which individuals, the steps for successful delegation follow. For this example we will use the task of placing the weekly order for medical supplies:

Step 1: Clearly Define the Task and the Outcome

Clearly define what it is you are delegating, what happens if the task is not done to expectation, and why the task is important to the center.

Example: Once per week you will be placing the order for medical supplies. Without the proper supplies on hand we would have to send patients elsewhere or give the patient care that is below our standards. Having the proper supplies enables us to safely treat our patients and protect our staff.

Step 2: Explain the Rules and Guidelines

When explaining how a task is done, the tools used to accomplish the task, and the rules to follow. Keep in mind there are three styles of learning:

- Auditory—Someone who learns mostly by *listening*.
- Visual—Someone who learns mostly by *watching*.
- Kinesthetic—Someone who learns mostly by *touch* and by *physically doing* the task.

While "visual" is the most common learning style, people are most responsive to a combination of the three styles.

Example: Tomorrow when I place the supplies order I will have you do it with me. Using the vendor's Internet portal, the order has to be submitted electronically by noon on Wednesday to assure delivery by Friday. If the order is not placed by 12:00pm on Wednesday, we will have to pay an additional fee to expedite it.

Step 3: Explain the Resources Available

This is where you highlight the tools you use to complete this task and detail where your trainee can turn for answers to his/her questions.

Example: Every week I pull up this report to see how much of each item we used the previous week, how many we should still have on hand, as well as variance from our trigger re-order quantities. I then go to the supply closet to verify our current inventory before marking the item for re-order. I always order the equivalent of four days extra just in case we are busier than expected or in case something is out of stock the next time we order it. I also consider our seasonal needs—for instance, during flu season I always order more facemasks for the lobby.

Step 4: Set a Deadline and Review the Work

Since the task is new for your trainee it is a good idea to set an early deadline the first couple of times so that you can double check their work. As this is a new task, it's highly likely that mistakes will be made, so be patient. Also, don't

confuse this step with micromanaging—practice makes perfect and having them correct their own errors provides a learning experience.

Example: Next week will be the first order you create on your own. Since the order has to be submitted by noon on Wednesday, please have it ready by 10:00am so we can review it together and make sure it's complete, correct, and ready to submit.

Step 5: Ask Them to Repeat the Instructions Exactly

Have your employee repeat back the exact steps they will take to complete their new task. This is a great opportunity to hear how they process information and to see if there is a detail you need to place more emphasis on. If the task has several steps you may want to create a checklist or simple training guide for the employee to follow.

Example: Just to make sure you understand how to do this, can you walk me back through the steps we just discussed?

Step 6: Measure Their Progress with Set Times

This is where you set the expectation as to when the trainee will need to have their new task mastered. Our example is a process with only a few steps, but if you are delegating something that's more complicated then you may require that Steps 1-3 be mastered in two weeks, Steps 4-6 in four weeks, etc.

Example: I will review your orders with you every Wednesday at 10:00am for the next four weeks. The first two weeks I will complete an order of my own to see if ours match. The following two weeks you will walk me through how you made your decision and I'll show you any areas for improvement. After four weeks you should be preparing and placing the orders completely on your own.

Step 7: Define Consequences for Performance and Non-Performance

This is where you set both positive reinforcement and corrective actions if the new responsibilities are not met to full standards. Again, you'll want to leave room for the learning curve, without sacrificing quality.

Example: If you have successfully performed this task for three months you will be eligible for a promotion. If this skill is not mastered in three months we will have to take it off of your plate. If you miss the deadline for placing the order by 12:00pm on Wednesday, we will be charged a \$100 fee for placing an expedited order.

For the urgent care operator, delegating tasks and developing staff will take a lot of your time. When you're in the "whirlwind" it's easy to say you just don't have time. But remember—developing others is a short-term investment with a long-term gain. Your goal in delegation is to empower your staff while improving your leadership skills and giving you more time to grow your business.