Six Essential Tools for
Effective Team Delegation

Authors:
Melanie Smith, Pharm.D., MBA, BCPS
Amber Lucas, Pharm.D., MBA, BCPS, FASHP
Rachel Root, Pharm.D., MS, BCPS
Amy Thompson, Pharm.D., MBA, BCPS
Timothy Vink, Pharm.D., MAOL, BCPS

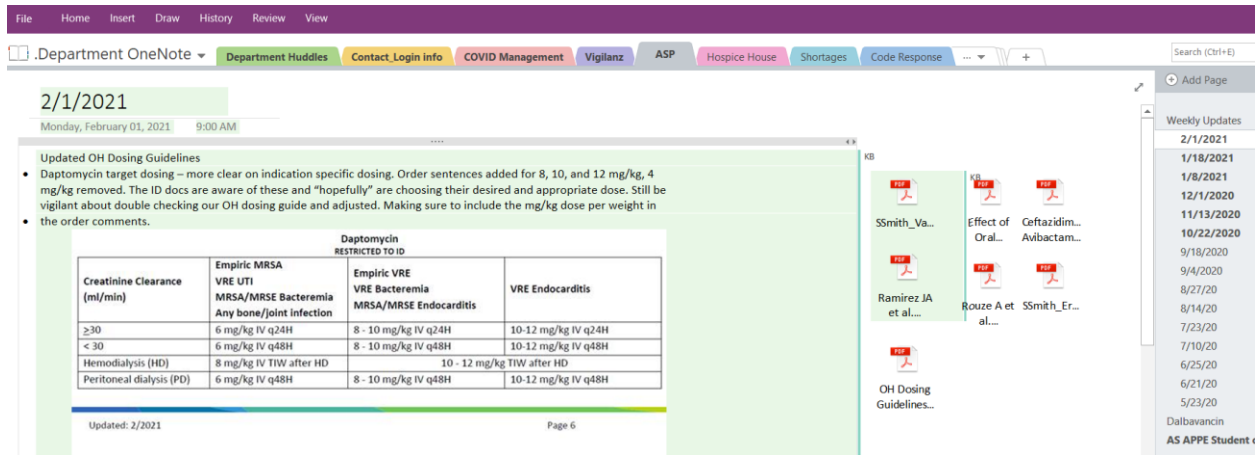# 6 Essential Tools for Effective Team Delegation

By Melanie Smith, Pharm.D., MBA, BCPS, Amber Lucas, Pharm.D., MBA, BCPS, FASHP, Rachel Root, Pharm.D., MS, BCPS, Amy Thompson, Pharm.D., MBA, BCPS, and Timothy Vink, Pharm.D., MAOL, BCPS

If you've ever led a team through a project, you know that delegation can be the make or break decision in the success of your project. The following six essentials provide a quick overview of effective tools with suggestions for utilization.

- Microsoft OneNote©
- Microsoft Teams©
- Trello©
- Microsoft SharePoint©
- Microsoft Excel©
- Leader Capacity Board

1. Microsoft OneNote©
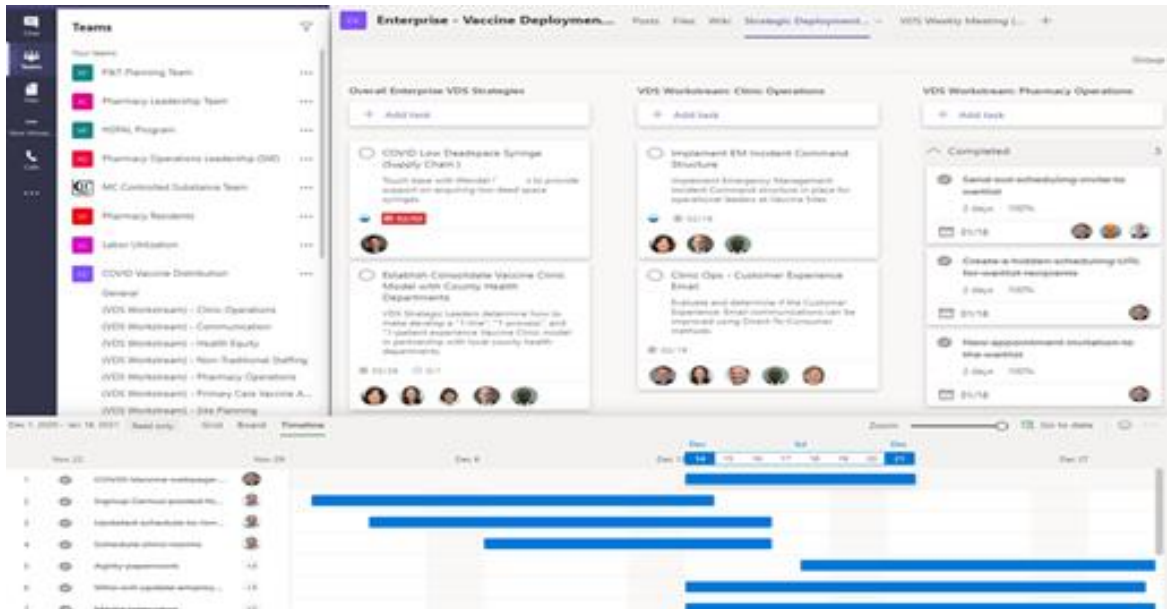

OneNote is part of the Microsoft Office suite and is a useful project management tool. It can keep projects organized, be used to share notes across teams, keep track of assignments and delegated tasks, and store easily retrievable information. It can also be integrated with Outlook to Manage Tasks and Meetings. OneNote can sync across devices, saves as you edit, and can be accessed and edited by multiple people at the same time.

OneNote contains 3 primary hierarchies: Notebook, Sections, and Pages. A Notebook can be used for each project or it could be used as a shared file for a leader group or team. Notebooks can be further divided into Sections which can be grouped together and/or password protected (even within a shared Notebook). Use Sections for each part of a project or if using a shared Notebook among a team, use Sections for each of the team projects. Pages within each Section can be used for assignments, tasks, progress, deadlines, etc. Pages can be further organized with Subpages which is especially useful for action items. Use tags to easily categorize, prioritize, organize and find what you need.

2. **Microsoft Teams©**

Teams is part of the Microsoft 365 suite of applications, and each Team comes with an online SharePoint site, OneNote notebook, and Outlook email address. Each Team can be used to organize a single workgroup or project with channels in each Team to focus on a single workstream or topic within the project. One of the most useful features of Teams is the chat function and video conferencing that allows for meetings of up to 300 people. Teams also allows users to create and share task boards and delegate work to other teammates by assigning those tasks. In addition to task boards, Teams can be used to create timelines and schedules of events or deadlines and share documents that can be co-edited in real-time. Teams is able to integrate with many different apps and services, so it is easily customizable for individuals and organizations.

3. **Trello**©
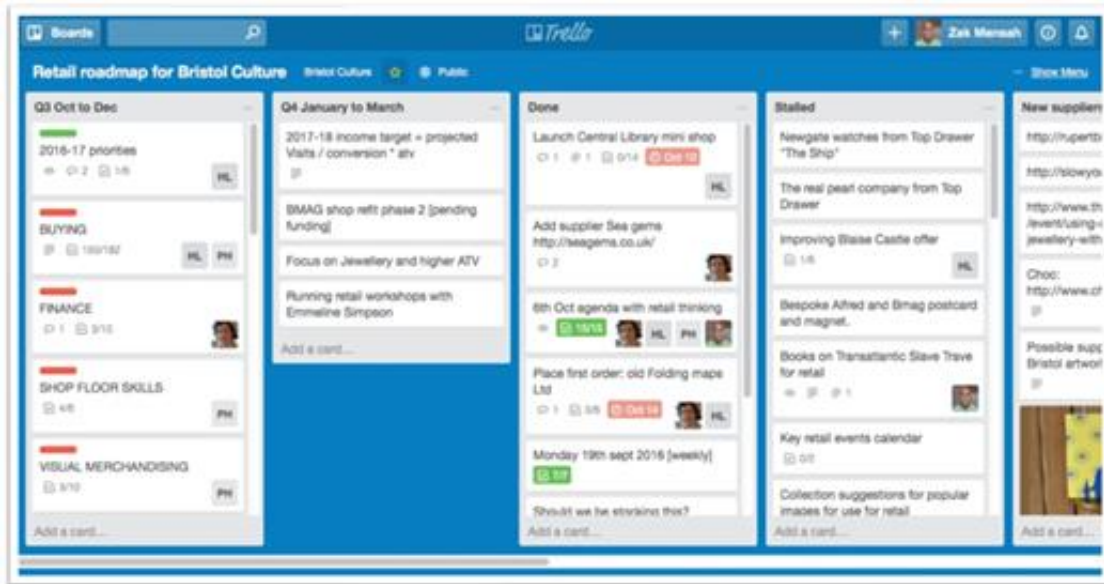
Trello is a web-based visual management system to organize tasks. It allows users to quickly prioritize next steps of a project, see what tasks are left outstanding, and review the list of work that has been completed. Trello is flexible enough to be used by a single user for individual work or at an organizational level for projects with multiple stakeholders. Navigating the platform is intuitive and easy. Accountable leaders can delegate projects or individual tasks by assigning to group members. Tasks are added to the project board and can be grouped into columns to keep workstreams organized, and Trello can be integrated with other software like Google Drive, Dropbox, Slack, and Evernote. Trello is free to use but also has a paid version starting at $12.50 per month with additional features like timelines, map views, and larger file storage capabilities.

4.   **Microsoft SharePoint©**
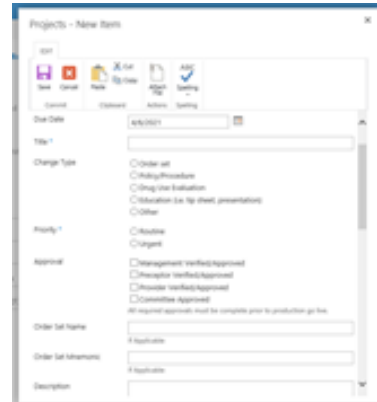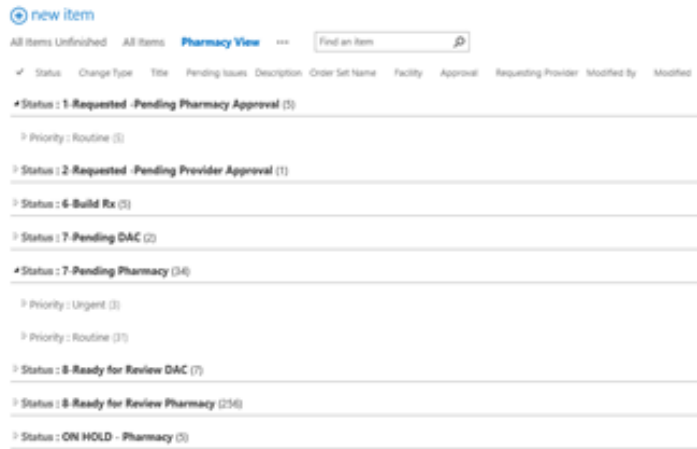
SharePoint is a web-based collaborative platform that integrates with the Microsoft Office suite. Most widely known for its document storage and management, SharePoint is also highly customizable for implementing a change control process or delegation workflow. Project type, date, title, priority, description text box, and files can all be added to each entry. A status indicator can assign projects to individuals and management for final verification. Email alerts can be configured to send a notification when a project is assigned to the user's work queue.

5.   **Microsoft Excel©**

Microsoft Excel is a powerful tool for organizing and analyzing data. One template that can be utilized for organizing tasks, delegating, assigning timelines for completion, and assessing current status is the marketing project planner template. This template can be found by searching prebuilt templates. The project planner template can be customized by person or by project. Tasks are easily delegated and the status of any task is visible at a given point. The document can then be shared to allow all stakeholders to contribute simultaneously.

6. Leader Capacity Board

If you are looking for an effective delegation tool that can be used with your existing software, creating a Leader Capacity Board may be the solution for you. This board can be built within an Excel spreadsheet or Google Sheet for easy sharing. The Leader Capacity Board is a simple, color-coded tool used to keep track of projects and allows users to quickly see where time is being spent as well as an individual's feelings of capacity. Multiple tabs can be added to track projects with discrete start and end dates, ongoing responsibilities (i.e. committee work), and pending requests/future ideas. Users are expected to update project status and overall capacity color at least monthly. This tool can be used during regularly scheduled meetings with your supervisor and your supervisees to assist in scheduling and goal planning.

Additional Resources for Delegation

Books:
- *How to Delegate* by Robert Heller

Articles:
- "Five Ways to Successfully Improve your Poor Delegation Skills"
- Fenn and Plake. Developing delegation skills. AJHP. 2020;77(4):254–258. https://doi.org/10.1093/ajhp/zxz313
- Harvard Business Review's Delegation topic area contains a great collection of delegation related articles

Videos:
- *How to Delegate Effectively* by Colin Boyd
- *How to Delegate* by Dave Ramsey