This guide is provided for use with the Delegation Master App. By adopting the approach described, you will consistently achieve better outcomes when delegating work to others.

Using Delegation Master and Belbin in combination to match people to the right work.

DELEGATION MASTER + BELBIN

Clarifying what's expected of people

Identiflying a person's work preferences.

Job Satisfaction

High Performance

A Step-by-Step Guide

By adopting the framework described on the following pages you will be able to consistently assign the right work to the right people and achieve outstanding results.

Step One – Defining the Work to be Assigned

Use the Delegation Master colour classifications to ensure there is total clarity about what you are asking of people.
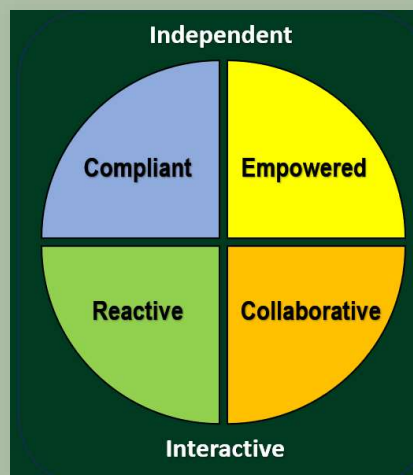
Compliant — The Blue classification is used to denote work that must be undertaken in a prescribed way.	**Empowered** — Yellow is used to convey that the person has total discretion over how to go about achieving a goal or objective.
Reactive — Green indicates that the individual needs to assist others when specific circumstances arise.	**Collaborative** — The Orange classsification is used to assign a shared goal or objective to a defined team.

The Delegation Colour Classifications

Here some examples of work assigned using each of the four colour classifications.

BLUE – Complying with a process or procedure
Retail: "Please ensure all new stock is scanned into the inventory system by the end of the day following the standard stock management procedure outlined in the training manual."
Healthcare: "Complete patient record updates by following the clinic's documentation protocol after every appointment today."
Finance: "Ensure that all client payments received today are logged and reconciled using the standard bookkeeping process."
Manufacturing: "Follow the quality control checklist to inspect all finished products before they are packed for shipment."

YELLOW – Responsibility for achieving a goal or objective
Marketing Agency: "Develop and deliver a social media campaign to increase brand engagement by 15% over the next three months.
Hospitality: "Your goal is to increase our restaurant's dinner reservations by 20% in the next four weeks. Use your judgment to determine the best strategy."
Tech Start-up: "Launch a beta version of the app by the end of this quarter. Collaborate with the team as needed to define the scope."
Education: "Prepare a virtual open day plan for prospective students to increase applications by 10%. The event should take place in the next six weeks."

GREEN – Responding to requests for help/support under defined circumstances
Retail: "Please assist with customer queries at the checkout during busy periods between 4 PM and 7 PM today."
Healthcare: "Be available to support the front desk staff if the patient check-in line exceeds five people at any time today."
Finance: "Step in to help the accounts team if their workload prevents completion of all invoices by 5 PM."
Logistics: "Respond to requests for help by the packing team if there are more than 50 parcels waiting to be processed during your shift."

ORANGE – Team responsibility for achieving a goal or objective
Marketing Agency: "Collaborate with the design and content teams to produce a marketing report for our top client by the end of the month. Ensure it includes performance metrics and next-step recommendations."
Hospitality: "As a team, organize a themed dinner event for next Saturday, aiming to attract 50 guests and generate positive social media feedback. Confirm the theme and promotional strategy by Monday."
Tech Start-up: "Work with the engineering and UX teams to ensure the new app feature is user-tested and live by the 15th of next month. Submit a test report before launch."
Education: "With two other teachers, create a curriculum guide for the upcoming semester by the end of the term. The guide should include lesson plans, assessment methods, and key resources."

Step Two – Identifying the Personal Qualities Required for the Work

Having defined what work you wish to delegate the next step is to identify the personal qualities required to achieve the desired outcome.

This should include the *hard* factors, such as skills and experience, and the *soft* factors, the personal attributes and talents required.

For small tasks this can be done informally by drawing on your knowledge and experience. For more significant tasks or projects it is suggested you use a robust process though, particularly for defining the *soft* factors.

I have found the Belbin Job Assessments and Reports to be ideal for this. They are well proven, easy to use and are available to Delegation Master App users free of charge.

To demonstrate the process, I have selected a brief taken from the Yellow Classification:

> *"Develop and deliver a social media campaign to increase brand engagement by 15% over the next three months."*

First, let's consider the *hard* factor requirements.   They would include such things as:

> *Experience in using social media and brand promotion*.

Turning to the *soft* factors, in the example below you will see how the Belbin Job Requirement Assessment is used to rate the importance the first 4 of 16 factors for the above task.

Social Media Campaign

The sixteen factors are defined below, with examples:

Section 1 - Task Demands

		A	B	C	D
1. Autonomy	The job holder is required to develop the individual field of work; to determine how the job should be tackled without needing to draw on the advice or direction of others. (Dentist, Sculptor)	○	●	○	○
2. Persistence	In order to do the job well, the holder needs to work relentlessly and untiringly in pursuit of a particular objective or set of objectives. (Telesales/Marketing, Credit Controller)	●	○	○	○
3. Meticulousness	The job requires consistent high-quality work in circumstances where the consequences of failure could be serious. (Quality Control Manager, Auditor)	○	●	○	○
4. Preparedness	The job demands that much time and attention are given to anticipating needs, forward planning and practical preparation. (Conference Organiser, Stock Controller)	○	●	○	○

The Resultant Belbin Job Report

Once the Job Requirement Assessment has been completed a report can be generated containing advisory text and a chart showing the relative importance of each of the 9 Belbin Team Roles.
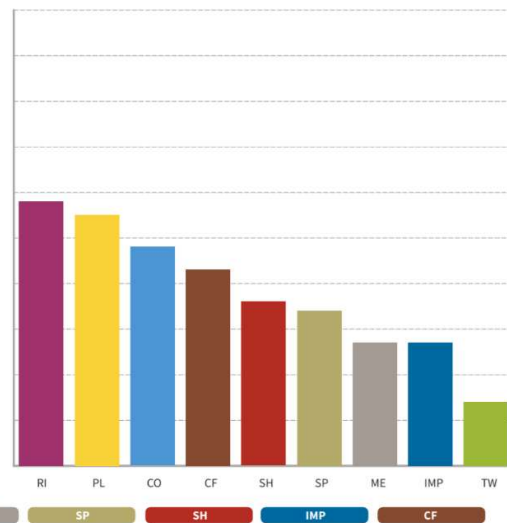

Step Three – Conducting a Gap Analysis

This involves assessing the match of the person against the task or project's defined *hard* and *soft* factors.

Again, this is relatively easy for the *hard* factors but even so, it is suggested that you use an objective process for this. For example, using a scale of 1 to 10 for the importance of each factor to the relevant work or project. A gap analysis can then be done using the same scale for the person's rating for each of the factors

The process for completing a gap analysis for the *soft* factors using Belbin involves:

1. Arranging for the nominated person to complete a Belbin Self Perception Inventory, with observer feedback if possible.
2. Producing a Job Comparison report. (See the examples below.)

Example 1 – A Poor Match

BELBIN® Alex Example - Match for Social Media Campaign

Suitability for the job Social Media Campaign as specified by Barrie Watson

Social Media Campaign

Alex Example
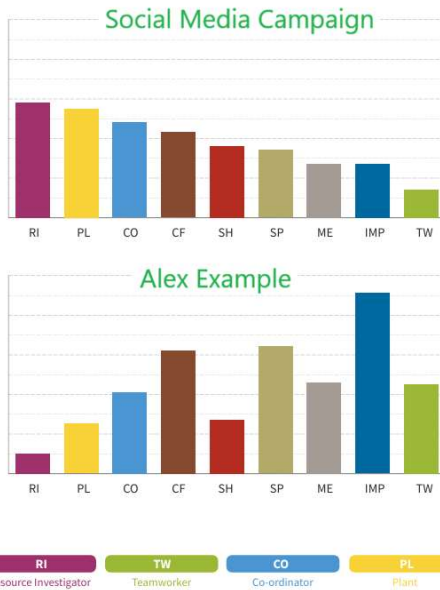
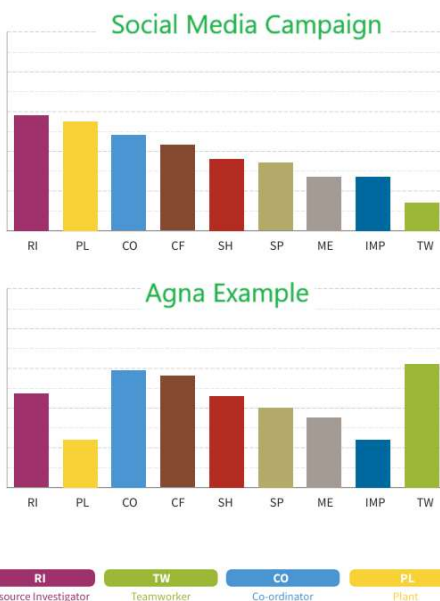**In comparison with the job of Social Media Campaign, Alex:**

● Appears to have an aptitude for liaison work and a readiness to work with others to achieve group objectives.

● Is perhaps too inward-looking for the demands of this particular job.

● May not have the visionary qualities required to make an impact in this area.

RI	TW	CO	PL	ME	SP	SH	IMP	CF
Resource Investigator	Teamworker	Co-ordinator	Plant	Monitor Evaluator	Specialist	Shaper	Implementer	Completer Finisher

Example 2 – A Good Match

BELBIN® Agna Example - Match for Social Media Campaign

Suitability for the job Social Media Campaign as specified by Barrie Watson

Social Media Campaign

Agna Example

In comparison with the job of Social Media Campaign, Agna:

● Is likely to demonstrate the initiative and resourcefulness needed for the job.

● Is likely to demonstrate the initiative and resourcefulness needed for the job.

● To have an aptitude for liaison work and a readiness to work with others to achieve group objectives. may not have the visionary qualities required to make an impact in this area.

RI	TW	CO	PL	ME	SP	SH	IMP	CF
Resource Investigator	Teamworker	Co-ordinator	Plant	Monitor Evaluator	Specialist	Shaper	Implementer	Completer Finisher

Step Four – Make a Decision

When making a decision you may have to make a compromise, but you will be able to do so with a clear understanding of the situation.

When faced with this scenario, it is suggested that you compromise more on the *hard* factors as skills, knowledge and experience can be developed and it provides scope for personal development.

Re-engineering people's inherent qualities, or *soft* factors is more difficult though so try not to compromise too much on this. When the situation arises where the person's natural attributes are not an ideal fit here are two things worth considering.

One is to slightly re-shape what you are assigning to better suit the person. The other is to pair the person up with someone who possesses the missing qualities, or maybe a bit of both.

By following the procedures in this guide, you will consistently make better decisions and reap the rewards of being a Delegation Master.

This will include, increasing the job satisfaction among your team as they feel trusted, valued, and more involved in their work. And for you personally, becoming a highly regarded and much sought after manager.

Good delegating.

Barrie Watson©2025