

Delegation Handoff Risks... and Solutions

A legal team cannot thrive without effective ways to handoff—that is, to delegate—critical legal tasks. In Chapter 15 of All Rise, I highlighted common pitfalls in the “handoff” of legal work. Below is a summary of those handoff risks and solutions to consider.

Handoff Risks	Solutions
Delegating without context	<ul style="list-style-type: none"> • Discuss not just the task and matter but the client, practice group, and firm strategy
Delegating without guardrails	<ul style="list-style-type: none"> • Time estimates/time-boxing (e.g., “If you spend more than two hours, check in with me.”) • Scope constraints (e.g., issues to avoid, decisions that were already made) • Resource support (e.g., if <u>needed</u>, leverage paralegals, other associates, vendors) • Relief valves (e.g., reducing scope, reducing formality, requesting more time) • Also helpful: a “surface, don’t solve” rule
Delegating without prioritizing	<ul style="list-style-type: none"> • Discuss other priorities within the project • Discuss the person’s priorities outside the project • Talk about expected personal time or PTO constraints • Ask about other personal priorities and goals
Delegating to the same people	<ul style="list-style-type: none"> • Ensure balance across the team by tracking and reviewing assignments before delegating new tasks • Be aware of your own biases and “favorites,” and remember that a manager’s job is to teach
Not accounting for working style differences	<ul style="list-style-type: none"> • Ask the attorney to recap the assignment via email after the meeting • Ask how the attorney plans to approach the task, giving you a chance to hear the thought process (and spot issues) • Check in the next day after work has begun, asking about progress and offering to answer any additional questions • Avoid: “Do you have any questions?” Instead, try: “What questions do you have?”