

# Delegation Skills

## Note-Taking Guide

*Presented by IMA Leadership Academy*

## TODAY'S AGENDA

1. Overview
2. Benefits and Challenges of Delegation
3. Six Steps to Delegation
4. Coaching
5. Feedback
6. Next Steps





## LEARNING OBJECTIVES

After this session, you will be able to:

- Define delegation.
- List the benefits and challenges associated with delegation.
- Describe how to assign tasks and responsibilities to others.
- Identify key management skills involved in delegation.
- Indicate coaching principles needed for delegation success.

### SELF-REFLECTION

On a scale of 1 to 10, where 1 is little or none and 10 is all of the time, how often do you currently delegate work to others?

1	2	3	4	5	6	7	8	9	10
Little or no delegation									Delegate all of the time

On a scale of 1 to 10, where 1 is ineffective and 10 is highly effective, how effective are you when you do delegate?

1	2	3	4	5	6	7	8	9	10
Ineffective									Highly effective

Explain your responses.

What do you hope to get out of this webinar?



## DELEGATION

Delegation is:

- The art of getting things done through other people.
- The skill of transferring to someone else a portion of your authority and responsibility while remaining accountable for the task.

## BENEFITS AND CHALLENGES IN DELEGATING

Benefits	Challenges
<b>For Employees</b>	
<b>For Managers and Supervisors</b>	
<b>For Organizations</b>	



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## HOW WELL DO YOU DELEGATE?

	YES	NO
1. Do you allow people to make mistakes?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you frequently take work home or work late?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you only delegate tasks you dislike?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do your direct reports feel they have sufficient authority to make decisions and handle tasks within their span of control?	<input type="checkbox"/>	<input type="checkbox"/>
5. Is your follow-up procedure timely and constructive?	<input type="checkbox"/>	<input type="checkbox"/>
6. As a pattern, do you tend to overrule or reverse decisions made by your direct reports?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you bypass your direct reports by making decisions that are part of their jobs?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you continue to do several things that your direct reports could and should be doing?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you fix your direct reports' mistakes rather than giving them constructive feedback?	<input type="checkbox"/>	<input type="checkbox"/>
10. When you delegate, do you specify the results you expect?	<input type="checkbox"/>	<input type="checkbox"/>

### Scoring:

- Give yourself one point for each “Yes” answer to Questions 1, 4, 5, and 10.
- Give yourself one point for each “No” answer to Questions 2, 3, 6, 7, 8, and 9.
- A high score is “8” or above

## SIX STEPS TO DELEGATION



### 1. Analyze Your Job and Your Time



What tasks are you expected to complete?	Check those that are most critical for you to work on	Check those that others could do

## 2. Decide What to Delegate

Consider:

- Decisions you make most often
- Areas where others are better qualified
- Tasks that make good learning assignments
- Skills you want developed and distributed in your team
- Tasks where direct reports need development or more variety
- Delegate things that will increase time and process efficiencies



What one task can you delegate immediately? Why?

## 3. Plan the Delegation

- Review your goals and the essential details
- Consider the level of authority you will maintain
- Establish performance standards
- Determine feedback controls
- Identify necessary resources
- If necessary, consider how to delegate from a distance
- Consider cultural differences, if applicable



In the space below, document a plan to delegate the task you selected in Step 2.



#### 4. Select the Right Person

Consider:

- People's interests, abilities, attitude, and maturity
- Who most needs challenges
- Long-term employee development
- The training needed and its availability
- The level of authority the person can handle
- The size of the task and if more than one person is necessary
- Avoid the pitfall of familiarity



Who are the people to whom you could delegate your chosen task? Why?

#### 5. Delegate

- Clearly communicate expected results, priorities, and the desired approach
- Discuss and answer the employee's questions
- Clarify authority and responsibility
- Explain the importance of the task and how it fits into the "big picture"
- Ask for a commitment



Identify the important points for a delegation discussion on your chosen task.

## 6. Follow-up

- Insist on timely feedback and information
- Insist on results, but not perfection
- Encourage independence
- Be open to different approaches
- Don't short-circuit or "snatch back" assignments
- Reward good performance
- Coach and provide feedback to your employees over the long- term



Jot down some notes on a follow-up plan to include things such as how often to check in, what status information is needed, time line, budget, escalation processes, and what a successful outcome looks like. Also, consider how to celebrate the successful completion of the task.

## COACHING

Coaching is asking focused questions to help an individual learn and grow.

Coaching is used for:

- Setting performance goals at the start of a task
- Helping a good performer get even better
- Helping someone who is underperforming

## THE RIGHT ENVIRONMENT FOR COACHING

- Set aside private, uninterrupted time
- Face-to-face with each other

Do not coach when:

- ✗ One person is preoccupied, stressed, or emotional
- ✗ There is an emergency or major time crunch
- ✗ There is only one acceptable answer—and you have it

Coaching typically involves a cycle of asking open-ended questions and then listening carefully to engage someone in a narrative discussion.

## OPEN-ENDED QUESTIONS

### Requests

- “Tell me more about ...”
- “Explain ...”
- “Give me an example of ...”

### Who, what, when, where, how questions

- What were you most satisfied with in your performance?
- How might you approach this project, based on your past experience?

## SAMPLE OPEN-ENDED QUESTIONS FOR THE START OF A TASK

- What other information could I share with you at this point?
- When would you like to get together again so we can touch base on your progress?
- What concerns or questions do you have about this assignment?
- Who could be a resource for you on this task?
- What obstacles or barriers do you think you might encounter with this project?
- Where will you go for additional information?



## SAMPLE OPEN-ENDED QUESTIONS FOR AN EAGER, SUCCESSFUL PERFORMER:

- What are you most proud of in your performance?
- Give me an example of an area in which you would like to improve.
- What information would help you do your job even better?
- Who or what have you found to be a valuable resource on this project? What other resources might you tap into in the future?
- Tell me more about your success with... How might you leverage that as we start this next project?

## SAMPLE OPEN-ENDED QUESTIONS FOR SOMEONE WHO NEEDS TO IMPROVE:

- Looking back over this assignment, what are you most satisfied with? In what areas would you like to improve?
- What has been your major learning experience from this assignment?
- What areas do you feel most confident in handling in this project? In what areas would you like additional training or feedback?
- What could I do better or differently to support you as you continue to fine-tune your skills in this job?
- Who else might you draw upon if you hit any stumbling blocks as the project continues?

## LISTENING STRATEGIES

1. Face the speaker and adopt a physical posture that shows interest.
2. Limit internal and external distractions.
3. Withhold judgment, focusing on content rather than delivery.
4. Do not interrupt the speaker.
5. Do not think about how you will respond to what is being said.
6. Listen for central ideas, not every single fact.
7. Reflect back what is being said to ensure understanding.
8. Ask probing questions only during pauses.
9. Tune into nonverbal cues from the speaker.
10. Ask for feedback from others.



## MATCH YOUR SPEAKER'S LANGUAGE

### Visual

Appear, bird's-eye view, catch a glimpse of, clarify, clear-cut, dark, dress up, enlighten, examine, expose, focus, glance, glimpse, graphic, hazy idea, hindsight, illusion, illustrate, in light of, in view of, look, look into it, make a scene, mind's eye, notice, obvious, outlook, perspective, picture, pinpoint, reveal, see, short-sighted, spectacle, take a dim view, tunnel vision, under your nose, vague

### Auditory

Audible, call, clear as a bell, clearly expressed, compose, discuss, earful, earshot, harmonize, hear, hidden message, listen, loud and clear, manner of speaking, mention, note, outspoken, remark, report, say, scream, shout, silence, sing, sound, speechless, tell the truth, tongue-tied, tune-in, voice, well-informed, word for word

### Kinesthetic

Affected, bear, boils down to, carry, cold, cool, crash, crawl, emotional, foundation, get a load of this, get in touch with, grab, grip, handle, hang in there, hassle, heated, hold, hot-headed, impact, irritate, lay cards on the table, lukewarm, motion, muddled, nail, pressure, rub, shallow, sharpen, shift, shock, slipped my mind, solid, sore, stir, stress, strike, tap,

throw, tickle, tied up, touch, wring

Source: See Bibliography [4]

## FEEDBACK

Sharing your perceptions of another's performance based upon objective analysis and observation.

### BENEFITS OF POSITIVE FEEDBACK

#### Gallup Survey

- When managers focus on employees' strengths, **67%** of employees are engaged.
- When managers focus on employees' weaknesses, only **31%** are engaged.

#### IBM Work Trends Survey

- Those who received recognition had engagement levels almost **three times** that of those who did not receive recognition.
- Those who receive recognition are far less likely to quit.

Source: See Bibliography [10]

### IMPLICATIONS OF NOT GIVING CONSTRUCTIVE FEEDBACK

#### For the **MANAGER**

- People continue to make the same mistakes.
- It reflects badly on their management abilities.

#### For the **EMPLOYEE**

- They develop substandard skills and competencies.
- Errors continue.
- They think their performance is fine.
- Their career advancement is hindered.

#### For the **ORGANIZATION**

- The work as a group is of lower quality.
- Some will think that lower work standards are acceptable.
- Discontent spreads when some get by with low-quality work.

### WHEN TO GIVE FEEDBACK

#### When It Helps

- ✓ It is requested.
- ✓ To reinforce what someone is doing right.
- ✓ To point out outstanding work.
- ✓ It will help them develop.

#### When It Doesn't Help

- ✗ The person has no control over the area.
- ✗ The feedback is vague.
- ✗ When stressed, rushed, angry, or overwhelmed.



✓ At the end of a task or project.

✗ It might be overheard.

## FEEDBACK GUIDELINES

- Be timely.
- Clearly and specifically state what the person has done right and what needs to change.
- Base feedback on behaviors—don't get personal.
- Be willing to take the necessary time.
- Deliver feedback honestly and kindly.

## THREE STEPS TO DELIVER FEEDBACK

Steps	Example
1. Briefly and clearly describe the situation and the behavior that needs to be modified.	"I know you worked closely on the last-minute request we got this morning from the senior manager. I observed several accounting errors in the information that was sent out."
2. Describe the impact on you or the organization.	"While the errors won't have a serious impact on client revenues, any numerical errors in the materials we send out reflect poorly on our office."
3. Identify and agree upon alternate behaviors.	"In the future, especially in a crunch situation like this, please double-check the figures. I encourage you to ask someone else on the staff to double-check the figures as well. We all need to work together to make sure we get information out quickly and accurately."

## ACTION PLAN

1. What are two tasks you want to delegate in the next month?

a. \_\_\_\_\_

b. \_\_\_\_\_

Schedule some time on your calendar in the next week to work through the six steps for delegating these tasks.

2. What are two actions you want to take to provide better coaching?

a. \_\_\_\_\_

b. \_\_\_\_\_

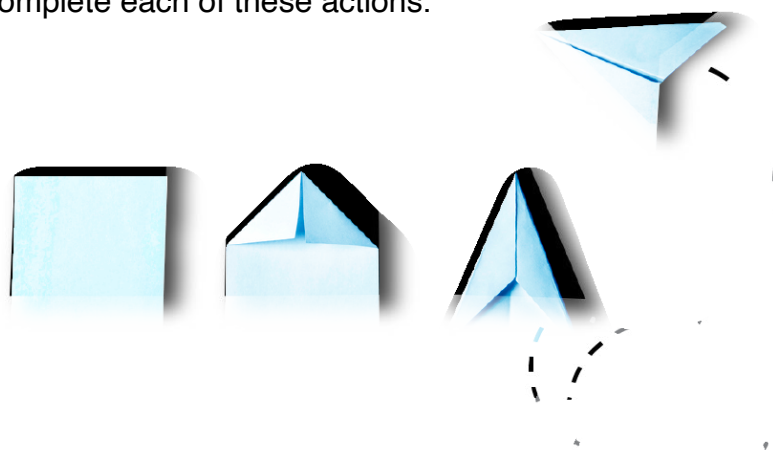
Indicate a deadline for completing each of these actions.

3. What are two actions you want to take to provide better feedback?

a. \_\_\_\_\_

b. \_\_\_\_\_

Indicate a deadline to complete each of these actions.







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