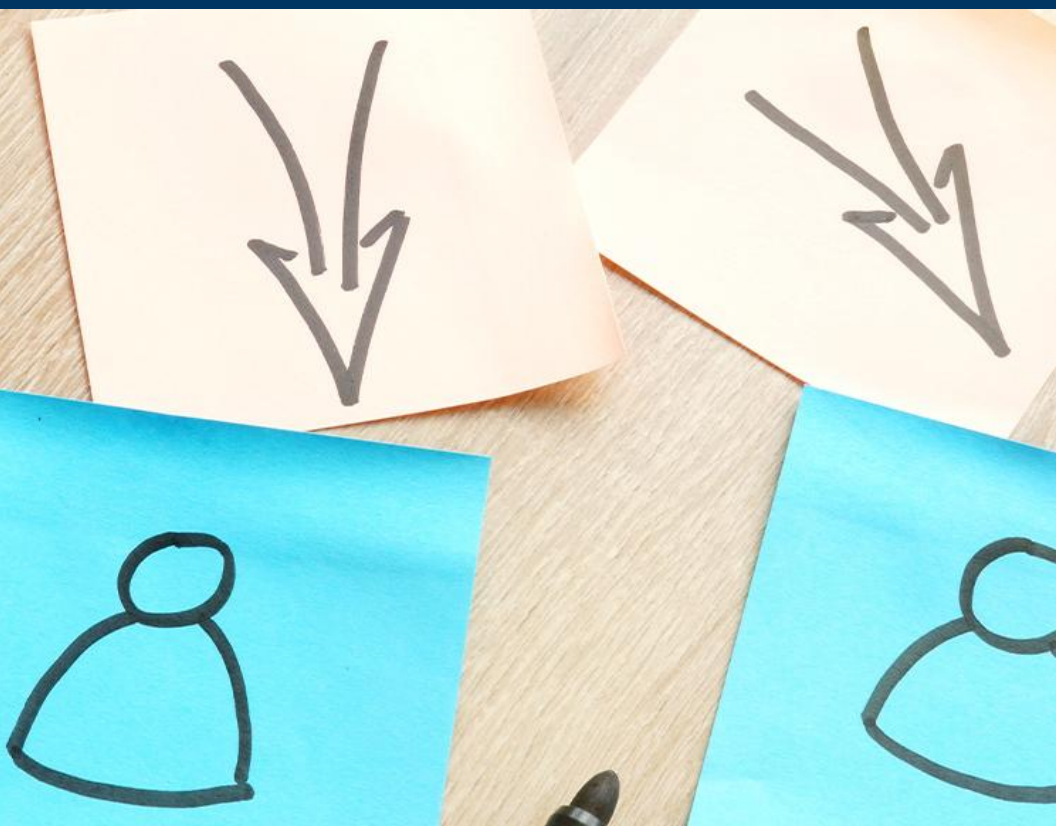


Intentional Delegation

Participant Workbook



Intentional Delegation

The Art of Delegation

- A simple definition of the term “The Art of Delegation” is to make the shift from doing to leading.
- Effective delegation requires planning skills, communication skills, coaching skills, and trust.
- Delegation involves working with subordinates to establish direction, authority, and responsibility.

The Art of Delegation

Make the shift from
doing to leading.



Intentional Delegation

Activity 2: Delegation Self-Assessment

Activity purpose: *to increase awareness of the various challenges and opportunities of delegating to others at this stage of your professional career.* For each statement or question, select the answer that most accurately applies to you.

- 1. I have to take work home or work late...**
 - Almost every night.
 - More often than not.
 - Occasionally.
 - Almost never.

- 2. Do I spend more time doing my own work than on planning and supervising?**
 - I spend almost all my time doing my work.
 - My work takes up somewhat more time than planning and supervising.
 - I spend relatively less time on my work than on planning and supervising.
 - I spend almost all my time planning and supervising.

- 3. In projects that I delegate, I overrule, or reverse decisions made by my team members...**
 - Almost never.
 - Occasionally.
 - Quite a bit.
 - Almost always.

- 4. I abandon associates or revoke their authority before they finish a project...**
 - Almost never.
 - Occasionally.
 - Quite a bit.
 - Almost always.

- 5. I am interrupted by associates who come to me for advice, for decisions, or with questions...**
 - Almost never.
 - Occasionally.
 - Quite a bit.
 - Almost always.

Intentional Delegation

Activity 2: Delegation Self-Assessment

- 6. Do I have unfinished jobs accumulating and difficulty meeting deadlines?**
- Yes, it's an overwhelming problem.
 - It's a significant problem but not overwhelming.
 - Moderately true.
 - No problem here.
- 7. Do I specify the results I expect from a delegated project, or do I specify the tasks to be done?**
- Almost always I ask for a result.
 - More often than not I ask for a result.
 - More often than not I specify the tasks to be done.
 - Almost always I specify the tasks to be done.
- 8. Do associates take the initiative in expanding their authority with delegated projects, or do they wait for me to initiate all assignments?**
- Associates constantly seek ways to expand their authority.
 - Associates are relatively aggressive in expanding their authority.
 - Associates self-initiate occasionally, but more often than not they wait for me to initiate delegations.
 - Associates wait for me to initiate all assignments.
- 9. I am irritable, tired, or worried because of job pressures...**
- Never or very seldom.
 - Occasionally.
 - Quite a bit.
 - Almost always.
- 10. When problems arise in a project I have delegated, I ask associates for their ideas.**
- Almost always.
 - More often than not, although occasionally I will handle problems my own way without seeking associates' ideas.
 - Occasionally, although more often than not I will handle problems my own way without seeking associates' ideas.
 - Almost never.

Intentional Delegation

Activity 4: What to Delegate/Not Delegate Checklist

Individually, review each task in the checklist and place a checkmark beside those items that you **WOULD** delegate.

- Your core responsibilities.
- All or part of a task that someone can do more efficiently than you.
- A task someone else can do at less cost than you.
- Tasks specifically delegated to you by your boss.
- Personnel issues.
- Tasks or activities with poorly defined objectives.
- All or part of a task that presents an opportunity to teach an associate a new skill.
- Tasks with clearly defined procedures and end results.



TIME:
5 minutes



Intentional Delegation

To Delegate... or Not

What questions or comments do you have regarding what to delegate and not to delegate?

Are there any of these you would disagree with? Why?

Delegate

- Tasks in which someone else has more experience or expertise than you do
- All or part of a task that presents an opportunity to coach a team member to develop his/her skills
- All or part of a task someone can do more efficiently than you can
- Work that someone who has more availability can do
- Tasks someone else can do at less cost than you
- Tasks with clearly defined procedures and end results

Do Not Delegate

- Your core responsibilities
- Things specifically delegated to you by your manager/partner.
- Work the delegate lacks the experience/expertise/professional judgment needed to complete
- An emergency or short-term task where there is not time to explain it fully
- Personnel issues/tasks
- Activities with poorly defined objectives
- Personal tasks

Intentional Delegation

Activity 5: Workplace Application

Steps:

1. Individually read the scenario. (Refer to the next page.)
2. Work in teams to answer delegating Step 1: Who, What, and How.
 - I. What roles/responsibilities will you assign to the current team? Why?
 - II. Which additional team member(s) will you request? Why?
3. If time permits, answer the questions to delegating Step 2: Communicate Clearly and Completely.
4. Save time to discuss the final question.
5. Be prepared to share your responses with the full group.



TIME:
10 minutes

Intentional Delegation

Step 3: Monitor Progress

- Monitoring progress helps you maintain ultimate control of the project by observing progress and having input along the way.
- Since you, as a delegator, retain ultimate responsibility for the task, you will want to make sure the team member stays on track. This allows you the opportunity to observe progress and make any corrections or direction changes, as needed.



- Collaborate to establish checkpoints, deadlines, and ways to monitor progress.
- Stay in contact with the team member. Observe the agreed-upon checkpoints.



Intentional Delegation

Activity 6: Monitor Progress

Steps:

Use the task you chose in Activity 4 to complete the following:

- Identify the task's purpose/context and its completion date.
- Identify milestones for the task.
- Define responsibility and authority levels for your task.
- Identify when to report back and other checkpoints.
- Identify what support and resources the person needs to do the task.




TIME:
7 minutes





Intentional Delegation


Five Essential Skills for Coaching


Your effectiveness as a coach in large part depends on how well you understand the communication dynamics underlying coaching and how successful you are at building and maintaining rapport. The following skills will help you prepare for and respond to the communication dynamics:

 **Active Listening** – Listen to what the other person is saying and how they're saying it. Demonstrate respect and interest through your body position, facial expression, and tone of voice. Paraphrase what they say to demonstrate and confirm understanding.

 **Questioning** – Ask open-ended questions to obtain information. Ask closed-ended questions to confirm understanding. Invite self-appraisal by encouraging the individual to evaluate their own performance/behavior/actions and their effect on the situation.

 **Observing** – Notice their body language (e.g., withdrawn or engaged), tone of voice (e.g., nervous, calm, agitated, happy, or excited), and behavior.

 **Providing Feedback** – Give feedback to the individual in the manner and frequency that they need and want it.

 **Reinforcing/Encouraging** – Praise improvement and provide ongoing encouragement.

Intentional Delegation

Activity 7: Active Listening

Steps:

1. Partner A answers the questions below to Partner B. Partner B listens and paraphrases what Partner A has said.
2. Partner A fixes any deviations from what Partner B has said. Note the total number of deviations.
3. Switch roles. Partner B answers the same questions while Partner A listens carefully and paraphrases what Partner B has said.
4. Partner B fixes any deviations from what Partner A has said. Note the total number of deviations.

Questions to ask direct reports:

1. How do you work best?
2. What do you find challenging about my management style?
3. How do you like to receive feedback (frequency, setting, method)?
4. What can I do to make your job easier?



TIME:
5 minutes

Intentional Delegation

Skill 2: Questioning

Types of questions:

- Open – How, What, Who, Describe to me
- Closed – Answered with a simple “yes” or “no”
- Probing – “Tell me more,” “Give me an Example,” or repeat the last word (echo): “He shouted?”
- Tests for Reaction/Understanding – “How does that sound?” “Does this make sense?”
- Opinion Seeking – “How should we proceed?” “What do you think happened?”

Questioning tips:

- Have one point per question.
- State questions simply and (wherever possible) one at a time.
- Adapt to the communication preferences of the person.
- Give the person time. Silence is okay.
- Minimize the use of “why” questions—these can provoke defensiveness.
- Be aware of your tone when asking questions. Your questioning tone can contribute to a speaker’s defensiveness. A disbelieving tone can provoke defensiveness.
- Demonstrate active listening skills while the speaker is responding to your question.

Intentional Delegation

Activity 8: Questioning

Steps:

1. Read the case study below.
2. Working in pairs, write three questions that the coach should ask.
3. For each question, identify what type of question it is.

Case Study:

Angela is a project manager for a training organization and seems to be doing well with most of her clients. However, there is a key relationship with a large, demanding client named Hovath that seems rocky.

Hovath has a whole team dedicated to the project they are working on with Angela, and the lead at their end seems somewhat disorganized. On top of that, one of the key pieces of training content for Hovath keeps changing.

Angela's manager, Jill, has been getting feedback that the client is concerned about meeting timelines. Angela, who is usually upbeat and expressive, seems annoyed every time she talks about Hovath. Jill wants to fix this. She wants to understand why the client is not happy and rectify the situation, so Angela is more in control. She needs to prepare for her conversation with Angela to ensure that Angela feels supported, not scolded. Write the questions Jill should ask Angela.

