

# Delegating Smartly

Participant Guide  
Web Workshop

# Purpose

To help you use delegation as a powerful tool for achieving results and developing people, whether you work next to those people or across the world from them.

# Learning Goals

By the end of this session, you will be able to:

- Specify what work to delegate and why
- Choose the right person to delegate to
- Use a model for successful delegation
- Identify your delegation strengths and weaknesses and eliminate the latter



# The Delegation Process



1. Deciding what to delegate



2. Selecting the person to delegate to



3. Making the delegation



4. Following up and monitoring



5. Wrapping up the delegation

# Delegation Effectiveness Assessment

Based on your experience with delegation, for each statement mark the response that best represents what you do. Each statement begins with the phrase “When I delegate, I strive to...”

When I delegate, I strive to:	Rarely	Sometimes	Often	Frequently
1. Consider the development needs of my staff.		2	3	4
2. Plan in advance what I will communicate when I delegate the assignment.	1	2	3	4
3. Get the employee’s input on the proposed assignment.	1	2		4
4. Make sure that I am providing the appropriate amount of authority.	1	2	3	4
5. Take into consideration the experience level and capabilities of the person I’m delegating to.	1	2	3	4
6. Use a systematic explanation process to ensure that the assignment is clear and understood.	1	2	3	4
7. Delegate assignments that cause people to stretch.	1	2	3	4
8. Make myself available to assist and provide support when necessary.	1	2	3	4
9. Allow people to use their own style and methods in getting the work done.	1	2	3	4
10. Coach people when they stumble rather than take back the assignment.	1	2	3	4
11. Refuse to have work delegated back to me.		2	3	4
12. Keep track of progress and intervene only when absolutely necessary.	1	2	3	4
13. Wrap up after the assignment is complete by reviewing it with the employee.	1	2	3	4
14. Take time after the assignment is complete to reflect on what I learned as a delegator.	1	2	3	4

Tally up the total number of points. Your score: \_\_\_\_\_

Based on this assessment, what are two areas of delegation that you would like to strengthen?

# Communicating the Delegation

## Explain

Allen, I'd like to get your help to prepare the survey results for our fall survey. We will create a white paper featuring these results and send it to 500 current or prospective clients.

I thought you might enjoy tackling this task because it will allow you to analyze and organize the data using Excel.

I'd like to cut the data several ways, not just display the overall results. You'll be able to download the survey results in two weeks and I'll need to have your first pass at the data two weeks after that.

You'll be accessing SurveyOnline to get the final results so you'll need to coordinate with Tom to get the user account information.

Once you download the data, please delete any unnecessary fields in the spreadsheet. I'll review your organization of the data and make any suggestions that I have. Then I'll write up conclusions and recommendations and pass the package back to you to complete the final white paper.

## Involve

Just to be sure that we're on the same page, would you review this assignment with me in your own words?

What questions or ideas do you have about this assignment?

How do you think you'll lay out the final report?

Any thoughts about how we could display the data using compelling graphics or visuals?



## Commit

So to confirm our agreement:

You'll download the data in two weeks when the survey closes.

You'll work with Tom to get the user account information to access SurveyOnline.

Then you'll take two weeks to organize and analyze the spreadsheet.

You'll consult me if you have questions about how to cut the data.

And you'll give me your first pass at the data summary four weeks from today.

I'll review your results and write up a conclusion and recommendation. I'll also indicate where I want to see bar charts and other graphics.

You'll prepare the final white paper using PowerPoint (including bar charts and graphics for the appropriate data).

Is there anything else you'll need?

Why don't we talk again in two weeks when the survey closes.

Allen, I think this is a great project for you to take on. Your analytical skills are top notch. You're very comfortable with Excel and PowerPoint. I look forward to seeing your report. Your efforts are going to help us get a high-quality white paper out to our clients by our deadline.

# Delegation Planning Worksheet

Use this page to plan for an actual delegation that you will be making soon. You will also use this sheet as the basis for the delegation practice activity that is coming up next.

## 1. Explain

Description of the assignment: \_\_\_\_\_

Results expected: \_\_\_\_\_

Completion date: \_\_\_\_\_

Employee's authority level: \_\_\_\_\_

Why selecting this person: \_\_\_\_\_

Benefits of doing assignment: \_\_\_\_\_

## 2. Involve

Questions the employee might have: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Concerns and objections: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## 3. Commit

What you will say to encourage employee commitment: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Follow-up steps you will use (meetings, reports, etc.): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_