

# Delegating Effectively in the Workplace

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**LEADERSHIP TRAINING SERIES**

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## Learning Objectives:

At the close of this session, you will be able to:

- Complete a self-assessment to determine your ability to delegate.
- Identify how manager benefit from effective delegation in the workplace.
- Adapt the five steps for effective delegation.
- Practice delegating skills through a role-play activity

## Discovery Group Discussion Question

Take 3-5 minutes to reflect and brainstorm the benefits of delegating work?  
Explore the WIIFM (What's In It For Me?):

---

*Reflection Activity*

➤ \_\_\_\_\_

➤ \_\_\_\_\_

➤ \_\_\_\_\_

➤ \_\_\_\_\_

## How well do you Delegate Self-Assessment

This exercise is an opportunity to identify your strengths and determine where improvements can be made on delegating.

Directions:

Read each statement and circle the number that best describes you.

The higher the number, the more the statement describes you.

When you have finished, total the numbers circled in the space provided.

| Questions  | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
|--|---|---|---|---|---|---|---|
| Each of my employees knows what I expect of them   | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| I involve employees in goal setting, problem solving, and other important issues confronting my work unit.                       | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| I place my personal emphasis on planning, organizing, motivating, and controlling, rather than completing tasks others could do. | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| When assigning work, I select the assignee thoughtfully.   | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| When problems occur on projects I have delegated, I give the employees a reasonable chance to work them out for themselves.      | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| When I delegate work to team members, I make certain they understand what to do and what is expected.                            | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| I see delegation as one way to help employees develop their skills, and I assign work accordingly.                               | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| I support and help employees in emergencies, but I do not permit them to leave work for me to do.                                | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| When I assign work, I stress the results desired but also show my willingness to help the employee where needed.                 | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| When I delegate a project that affects others, I make sure everyone concerned knows who is in charge.                            | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| When delegating work, I grant the authority to do the job based on an employee's experience level.                               | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| I hold my employees responsible for results of delegated tasks and projects.   | 7 | 6 | 5 | 4 | 3 | 2 | 1 |

Total: \_\_\_\_\_

- A score between 72 and 84 suggests you are on target.
- A score between 48 and 71 indicates you are getting by, but could improve.
- Anything below 48 means you need to make changes to improve your delegation skills.

*Adapted from the: Community Management Advisory Project Inc.*

## Self-Assessment Debrief Activity

- Score A:
  - A score between 72 and 84 suggests you are on target.
- Score B:
  - A score between 48 and 71 indicates you are getting by, but could improve.
- Score C:
  - Anything below 48 means you need to make changes to improve your delegation skills.
- We hope that you scored an A and that you're on target with effective delegation. However, if you scored below and A, don't worry. Today we will provide you with the tools to be an "A" Delegator!
- 

## What Is Delegation?

- The process of assigning tasks or projects to your employees.
- Obtaining the commitment from employees to complete the tasks or projects.
- Clearly verbalizing the expected outcomes and time-frames for completion of tasks.
- Collaboration between managers and employees to ensure tasks/projects are completed.

## Top Reasons why Managers do not Delegate work to Employees:

What are the top reasons why managers do not delegate work to their employees?

➤ \_\_\_\_\_

➤ \_\_\_\_\_

➤ \_\_\_\_\_

➤ \_\_\_\_\_

➤ \_\_\_\_\_

## Why Aren't Leaders Delegating?

### DELEGATE?

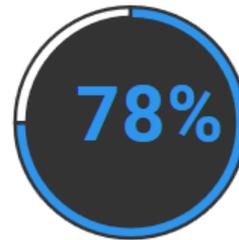
332 companies surveyed and only 28% offer training on the topic



■ Delegate ■ Don't Delegate

Harvard Business Review

### PERSONNEL PERSPECTIVE



Believe that their boss prefer to do something themselves instead of delegating

Association for Talent Development



### ENGAGED WORKFORCE

About only 1/3 of people are currently fully engaged in their work.

Reason: high workloads coupled with low autonomy/control

Baird Brightman, Worklife Strategies

## Removing Challenges to Delegation:

Let's introduce you to the three types of challenges managers face when it comes to delegation. This will help you to battle the many challenges you will face when delegating work.

### 1. Self-imposed obstacles

- \_\_\_\_\_
- \_\_\_\_\_

### 2. Employee-imposed obstacles

- \_\_\_\_\_
- \_\_\_\_\_

### 3. Situation-imposed obstacles

- \_\_\_\_\_
- \_\_\_\_\_

## Criteria to Delegate to Employees:

- Employees need to know what is expected of them.
- Work with employees in a way that enables them to take ownership for specific work tasks.
- Collaborate with employees to devise a strategy to achieve successful outcomes.
- Stay close enough to observe task-relevant behaviors and provide feedback /suggestions for improvement.
- Maintain enough distance to allow your employees to make decisions.

## What Tasks Should and Should Not Be Delegated:

Managers should not delegate:

- Responsibilities and duties such as performance reviews, employee discipline and strategic planning.
- Payroll and any confidential information.

Managers should delegate:

- A task the manager maybe used to perform prior to being promoted, where one your employees may perform this task.
- Tasks in which the employee may be an expert in.

## Five Steps for Successful Delegation

We've adapted a five step process for Effective Delegation:

Step 1: Decide What to Delegate

Step 2: Select the Right People

Step 3: Communicate Clearly

Step 4: Check in with Employees

Step 5: Share in Rewards and Give Credit Where Due

### ***Step 1: Decide What to Delegate***

- If you're new to delegating, start with a small project, or one that doesn't have to be completed in a specific way.
- Assign your least critical, time-sensitive tasks, and leave time for corrections/rework.
- Never delegate something you're not willing to do yourself.

## ***Step 2: Select the Right People***

- Begin by choosing the best people on your team to delegate work to.
- Focus on individuals you're confident can do the job well and are self-motivated.
- Take time to understand the strengths and weaknesses of the members of your team, and work to build on their skills.

## ***Step 3: Communicate Clearly***

- Put the task/responsibility into context and explain the reason it is being delegated.
- Consider people, location, equipment, materials etc.
- Be clear about your expectations, including timelines and deliverables.
- Provide the employee with all of the information they need to complete the tasks/project.

## ***Step 4: Check-in with Employees***

- Give your employees flexibility on how they accomplish tasks/responsibilities.
- Do check in periodically to make sure everyone is on task, and to offer to answer questions as needed.
- Alert the employee of any unusual matters within the organization they should be aware of.

## ***Step 5: Share in Rewards and Give Credit Where Due***

- Recognize an employee for their success, and discuss any areas for improvement and opportunity.
- Be sure to recognize and thank everyone who helped you all out.
- If you receive any rewards or praises for the project, share them with the team.

## Delegation Role-Play Objectives

Objectives:

- Learn how to explain a job tasks to an employee
- Check-in on employee's understanding of job tasks
- Use the Delegator's Dozen worksheet to follow-each step of delegation

## Delegation Role-Play Activity

Divide into groups of three:

- Roles: Manager, Employee, and Observer
- Select a scenario to role-play
- Rotate roles to allow each person to play each role
- Signal when you're done

Scenario 1:

As the manager, you've asked your employee Liz to prepare the agenda for the next staff meeting, and to also take minutes during the next meeting. Liz will need to collaborate with all staff members in the department to identify topics that need to be covered, review the minutes of the last meeting, and prioritize topics. This is a task that you've done plenty of times, and Liz could learn collaboration skills by working on this task.

Scenario 2:

As the manager, you've asked your employee Michael to introduce the new data entry protocol at the next staff meeting. The updated protocol includes the changes with the deployment of the new Enterprise Medical Record keeping system. Michael is as a star performer, and has lately been recognized for his leadership abilities. You notice that he needs coaching in the area of public speaking and facilitation, and this would be a great opportunity for him.

Scenario 3:

You are the manager and you're responsible for providing the monthly status report on reconciled inventory. You have a few other timely projects you're working on, and Anne has helped you with gathering portions of this report in the past. You believe with instruction and support, Anne would be capable of compiling the entire report on time for the quarterly meeting. You'd like to motivate Anne to complete the report and gain confidence to present the report as well to senior leadership.

## Delegation Role-Play Activity Debrief

- Did you follow the 5 Steps to Effective Delegation?
- What was most challenging?
- Were your outcomes successful?

## Summarize – Knowledge Check

Learning objectives earlier:

- Complete a self-assessment to determine your ability to delegate.
- Identify how managers benefit from effective delegation in the workplace.
- Adapt the five steps for effective delegation.
- Practice delegating skills through a role-play activity.

## Bringing it All Back

- Adapt the Five Steps for Effective Delegation when you return to the workplace
- Apply the Delegator's Checklist to be sure you're following the Five Steps for Effective Delegation.
- SYS – Share Your Success and let us know how it worked. We will feature successes in the Pulse Check-in monthly newsletter.
  
- Thank you for your time!
- Please complete the workshop evaluation form that will be sent via email!

