



DELEGATION IS LEADERSHIP

Reflect, write, share, and discuss

Describe a task delegated to you that went well and explain why?

Describe a task delegated to you that did not go well and explain why?

NOTES:

DELEGATION SCORECARD

Please rate the extent to which you agree with the following, with a score of 1 indicating disagreement and 5 indicating the highest level of agreement.

	1	2	3	4	5
If others were asked, they would say I am a good delegator					
I delegate tasks to those who will most benefit and develop from the assignment					
I am aware of which kind of tasks the individuals on my team are best able to accomplish					
When delegating, I involve the individual or team in identifying the desired process and outcomes					
When something goes wrong with a task I delegated, I give the individual or team a chance to work it out first					
When delegating, I make sure all those involved know their own and others' roles					
When delegating, I brief the individual or team on all the details of the assignment, including its purpose					
When delegating, I make sure everyone involved knows the expectations for accountability					
Working with the individual or team assigned the task, I discuss who should be consulted and why					
When the task is completed successfully, I reward the person or team responsible					

If your score is 41 to 50, you're on the right track; keep up the good work. If you scored between 30 and 40, look at where you scored low and develop some insights to help you improve in those areas. If you scored below 30, you need to work on your delegating skills. Regardless of where you scored, attending this workshop and putting its ideas into practice will help you improve.

Scorecard Reflection:

- Discuss the insights from your scorecard.
- What were your strengths?
- What were your areas of opportunity?
- Discuss ideas for optimizing delegation.

DELEGATION CYCLE

PREFERENCES

QUESTIONS TO ASK YOURSELF

- Do I constantly hold things back or do I share information with others?
- Am I a stickler for time, or do I let people accomplish their task on their own timeline as long as they reach the goals?
- Do I want constant updates, or just a report now and then?
- Do I consider achievement to be all about the numbers, or is strategy more important?
- How do I move towards my goals?
- Will I let the person or team assigned the task determine the process, or must I have it done my way?
- When I delegate a task, I prefer the assignee...
- As the delegator I want to be kept informed of....
- To me, success in a delegated task is when the assignee....

PEOPLE

GETTING TO KNOW THEM QUESTIONS:

- What do you do well?
- What do you do poorly?
- What kind of projects would you like to work on?
- In five years, where would you like to be in the organization?
- What is something not on your resume that you think might be helpful to our team and company as we move forward?
- What support do you need in order to succeed?
- How can I personally support you or find others who can do so?

TASK

DEFINING THE TASK - QUESTIONS TO ASK YOURSELF:

- Who is going to tackle the task?
- When should the task start and be completed?
- Where should the assignee go for information and assistance?
- Why is the task being undertaken?
- How will you be involved in the process?

DEFINING THE TASK - DIALOGUE TO HAVE WITH THE ASSIGNEE:

- How is the responsibility being allocated? Who's responsible for what part of the task? How will the assignee report to you, and when?
- How will the assignee be held accountable? Personal meetings, phone calls, emails, reports, etc.?
- Who needs to be consulted? Gives clarity as to who the assignee should seek out for more information.
- Who needs to be informed, and how?

ASSESS & REWARD

THINGS FOR YOU TO CONSIDER BEFORE DELEGATING THE TASK:

- Decide what level of authority you want to provide to the assignee
- Understand in your mind the task and purpose of the delegation
- Picture what success looks like and share this with the assignee
- Define the task and purpose, be precise
- Identify WHY you selected them for the task

KEY CONSIDERATIONS WHEN YOU MEET WITH THE ASSIGNEE TO DELEGATE THE TASK:

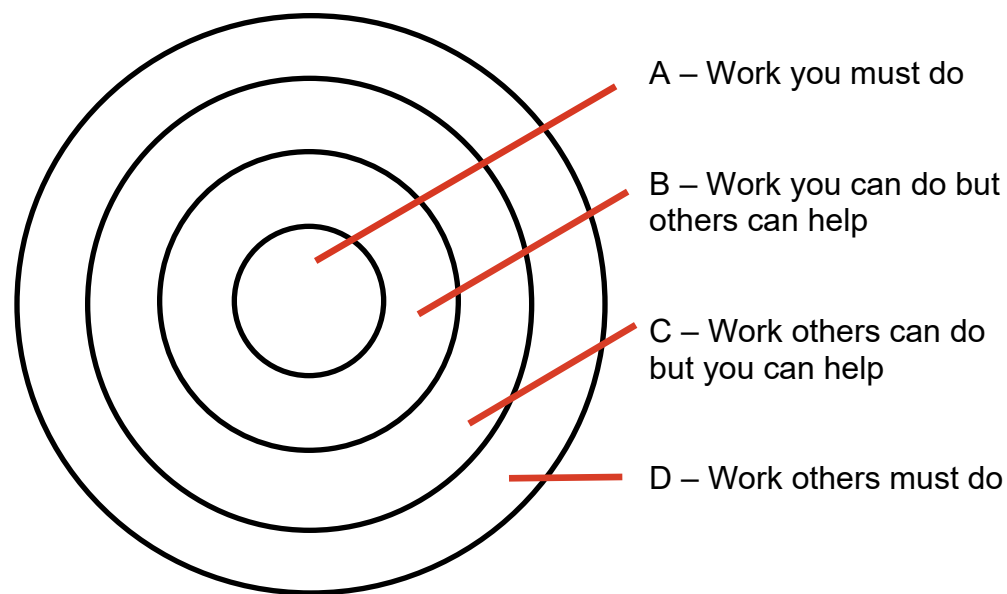
- After presenting the details from the above statements, ask the assignee how they think the task should be done
- Have a dialogue about the approach going forward, consider alternative solutions and approaches to promote trust and authority
- Establish how you both would like to check in
- Help the assignee prioritize actions to accomplish the task; make sure you are available based on a pre-determined schedule

FOLLOW UP QUESTIONS FOR AN OVERVIEW OF THE TASK AND ITS PROGRESS:

- This is where we are now - where would we like to be?
- What might be keeping you from getting there?
- What can I do to help?
- How are you doing? How do you feel about this project?

NOTES:

SHARE THE LOAD



Accountability: Share the Load - List the top 10 things you are accountable for in your job. Then, for each accountability, indicate the individual or team you are accountable to, it's priority and then assign a category to the task: A, B, C, D based on the chart on the previous page).

I'm accountable for (top 10)	To whom	Priority Ranking (1 = Low; 5 = High)	ABCD Category

TASK ASSESSMENT GRID

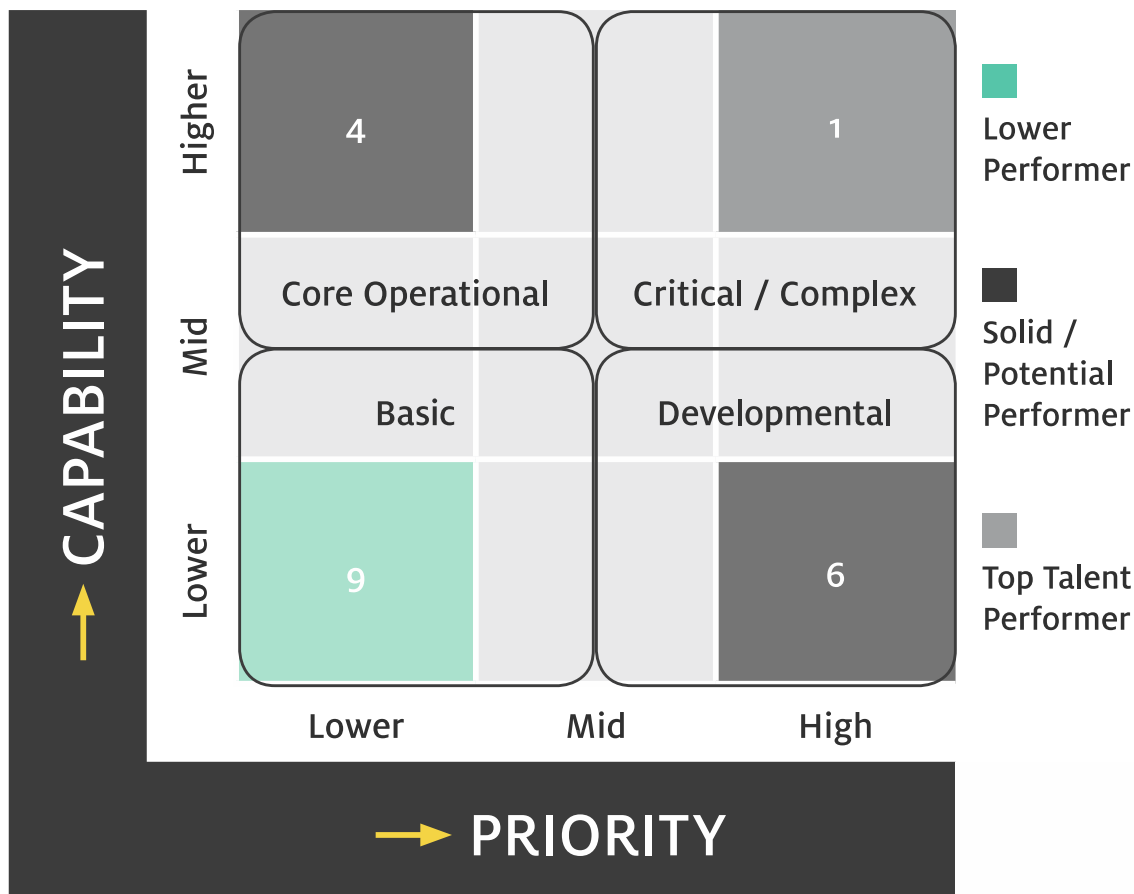
PEOPLE



It's important to consider the relative talent of the individuals to whom you can delegate tasks.

NOTES

TASKS



Different categories of talent should receive different types of delegated tasks.

Critical/Complex Assignment: Important tasks that typically require specialized knowledge and specific skills. These are good assignments for top talent OR YOURSELF.

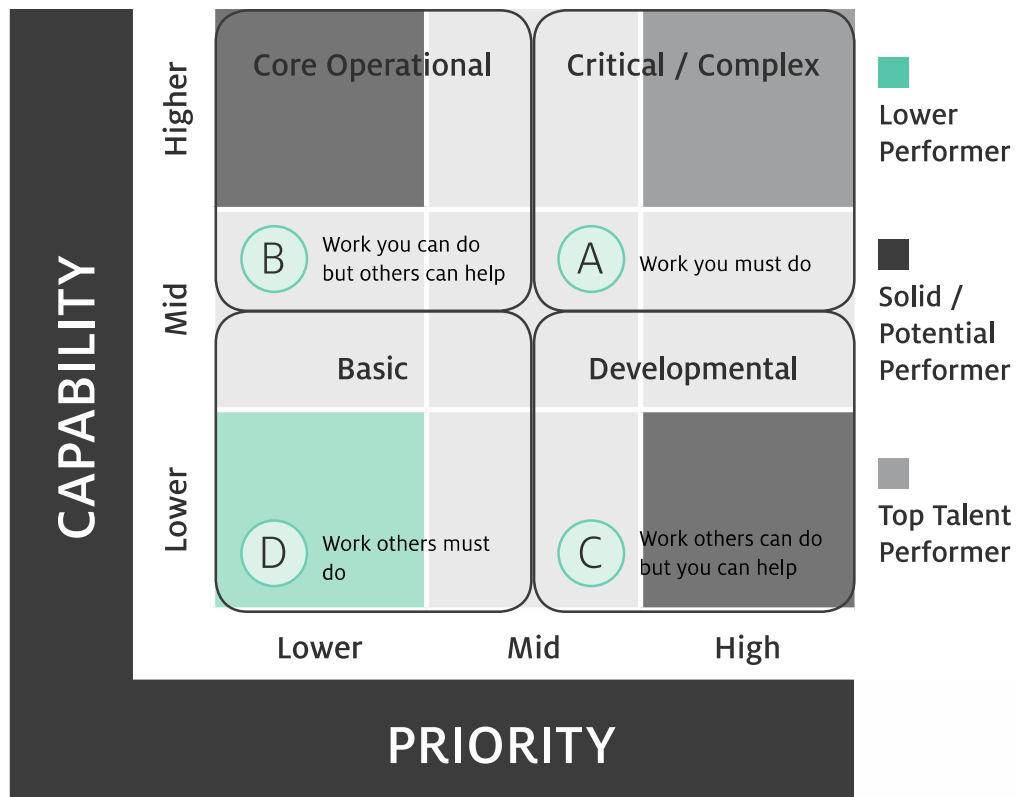
Core Operational Assignment: These tasks must meet specific standards; failure will have severe repercussions. For example, expense reports, quarterly budgets, contract agreements. They call for a solid performer.

Developmental Assignment: A formal opportunity to develop a professional's knowledge, skills, and abilities that would not otherwise be available through their normal work activities. They provide an opportunity to further one's potential.

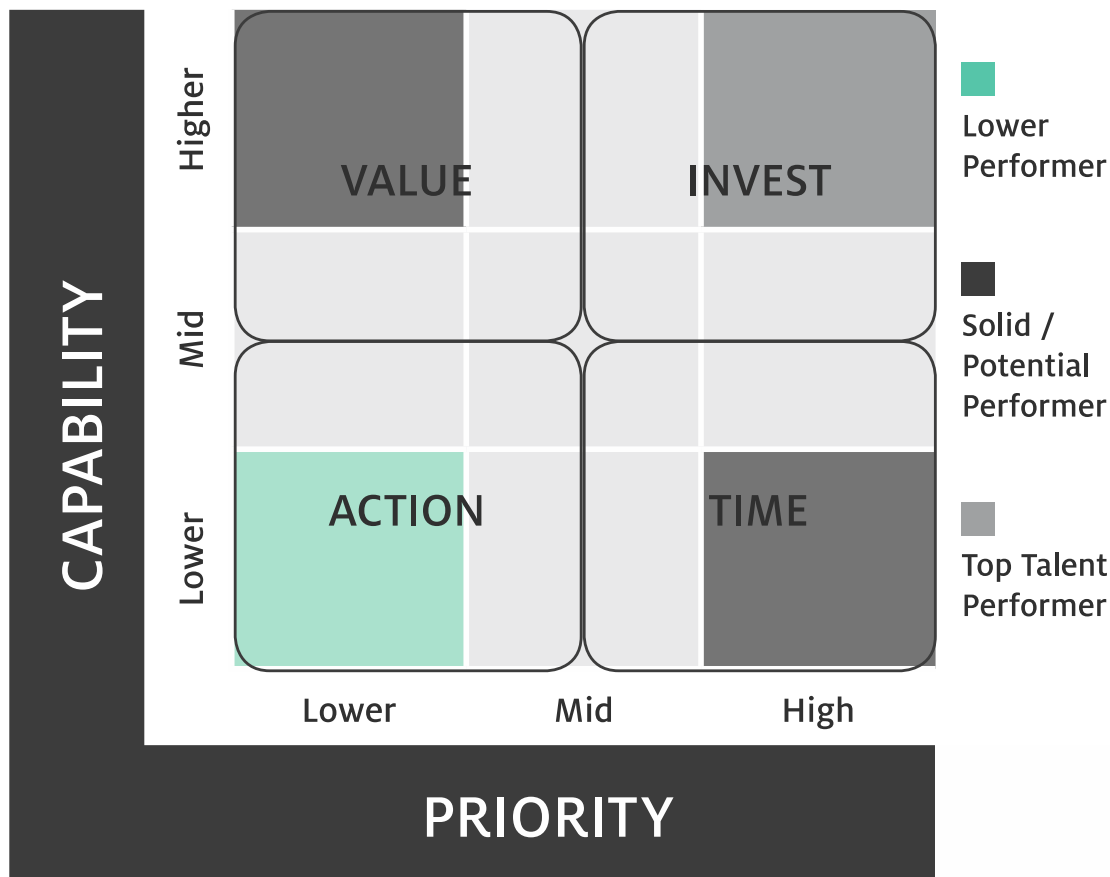
Basic: Basic duties for which leaders are accountable to make their work or team function well, such as coordinating schedules, quality checks, budgets, etc. There is lesser risk associated with delegating this work to lower performers.

NOTES

ABCD



A link can be established between the four types of tasks and the four categories of the Share the Load diagram.



Once you have determined to whom you're going to delegate a specific task, you have to consider the message to convey to the assignee.

ACTION: Work others must do. The key message when delegating is you need someone to take action and mitigate the risk of delays.

TIME: Work others can do, and you help them. The key message is you want to give your time to help develop them.

VALUE: Work you can do but others can help. The key message is value; you value the skills of the person or team to help you execute the work, and the task you're assigning has high impact and added value to the organization.

INVEST: Work you have to do. But, if you do assign this to someone, the key message is you are investing in them and you see them as being a vital asset to the work you do and the organization.

NOTES