**Strategies and Challenges**

* Strategies
  + Being timely
  + Planning in advance
  + Communicating x4
  + Matching tasks with skills
  + Investigating skill sets and using them to your advantage x2
  + Clarifying
* Challenges
  + Providing clarity in expectations and reception of delegations
  + Communicating x3
  + Finding time to invest in the delegation process x2
  + Motivating operators effectively x2
  + Knowing the risk around learning
  + “Letting go” x2
  + Trusting your staff x2

**What is Delegation?**

* Assigning and clearly defining tasks
* Retaining responsibility
* Planning/developing a strategy

**What are the Benefits?**

* Allows for greater productivity
* More time to focus on higher level tasks
* Develops a stronger team
* Grows the people
* Increases confidence

**What are the Risks?**

* Tasks could have a connection with fairness and/or status
* Staff may be resistant to learn
* Burning out best people
* Work may not be done well, or at all
* Possible losses to the company

**What are the Phases of Delegation?**

* Evaluation
  + Work analysis
  + Deadlines and timelines are secured
  + Resources in place
* Selecting the “Who”
  + Handover
    - Handoff process
    - Support
    - Check-ins
    - Monitoring
* Work completed
  + Debrief
  + End: evaluation

**Evaluation**

* Tasks
  + Which tasks can be delegated?
    - Easy, quick, stretch, or development
    - Uncritical tasks
    - Requires small amount of training
* People
  + How do you find out what your staff can do? (Now and over time)
    - Experiment
    - Time and experience
    - Find out what they are asking for
    - Assign a small piece of a project for them to do as a trial
    - Assess strengths by asking
* Matching tasks with people
  + Availability
  + Current workload
  + Novelty
  + Challenge
  + Life circumstances

**Handover**

* What will you need to do and think about to get ready to hand over the task?
  + A background document
  + Broad brushstroke sketch
  + Materials to other resources
    - Vendors
    - Security access
    - Data
  + Autonomy
    - Timeline/Milestones
    - Define reporting and communication frequency
    - Clarify the level of support you will provide
* What should happen in the handover meeting?
  + Clear definition of the tasks
  + Timeline
  + Provide tools
  + Communicate Confidence
  + Briefing
  + Explain the purpose of tasks
  + Beware: death by meeting
  + Confirm understanding
  + Clear next step

**Support**

* What should you do to support your employee after the handover?
  + Explain your open door policy
  + Have credibility as a supportive individual (make sure your actions support your words)
  + Be even keeled
  + Be humane and empathetic
  + Maintain expertise
  + Lead by example
  + Offer reward questions
  + Extend support
  + Check in on progress
  + Communicate: relay info
  + Be aware of the environment and continually adapt to it
  + Abide by agreements
    - Especially the ones in regards to autonomy

**Debrief**

* What should you do with your employee after the task has been completed?
  + Review
    - Ask how things went
      * What would they have done differently if they were to do it again?
      * Was it easy? Challenging?
  + Find out if there is anything left to do or follow up with
  + Compare results to defined outcomes
  + Analyze the positives and negatives of the assignment
  + Create a supportive learning framework
  + Lessons learned document
  + Provide recognition