Delegate to Motivate - Flip Charts

[In this “Socratic” style program, we asked participants to answer questions and recorded their flip chart responses. The trainer added only if substantial points were missing.]

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