



# REPRODUCIBLE TRAINING LIBRARY

Customizable Soft-Skills Courseware

## Delegating for Growth



Instructor Guide

Copyright © 2010 by HRDQ

Authorized distributor Dekon Business Solutions

Phone: 0040 734 350 525

[www.dekon.biz](http://www.dekon.biz)

The Microsoft name, Word®, PowerPoint®, and Outlook® are the property of Microsoft Corporation.

Cover image copyright © 2013 by Rido. Used under license from Shutterstock.com.

The material in this publication is provided “as is.” HRDQ disclaims any warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in this publication.

ISBN 978-1-58854-600-5

EN-01-MY-13

Please note: Only the pages highlighted in yellow below are those featured in this preview.

# Contents

<b>Module One: The Purpose of Delegation</b> .....	<b>1</b>
Course Objectives .....	2
Your Attitude Toward Delegation .....	3
Why Delegate? .....	4
Characteristics of Positive Delegation.....	5
Barriers to Delegation .....	6
<b>Module Two: Preparing for Delegation</b> .....	<b>7</b>
Deciding What to Delegate.....	8
Matching People and Projects.....	9
Delegation Don'ts.....	11
<b>Module Three: The Steps of Delegation</b> .....	<b>12</b>
Begin with the End in Mind .....	13
Identify Boundaries .....	14
Establish Communication Expectations .....	15
Provide Support .....	16
Anticipate Problems.....	17
Review Work.....	18
<b>Module Four: Mistakes, Missteps and Failures</b> .....	<b>20</b>
Letting Employees Make Mistakes.....	21
Help Employees Learn from Mistakes .....	22
<b>Appendix</b> .....	<b>24</b>
Action plan .....	25
Course review .....	26
Suggested resource list .....	28
Course evaluation.....	29

## Module One



### ***THE PURPOSE OF DELEGATION***

## Course Objectives

Successful completion of this course will increase your knowledge and ability to:

- ◇ Recognize delegation as a tool for employee growth (not just as a way to lighten your own workload)
- ◇ Prepare yourself to delegate effectively
- ◇ Assess your employees to determine their delegation needs
- ◇ Match employees and projects appropriately
- ◇ Identify barriers to delegation and overcome them
- ◇ Apply the steps to delegating effectively
- ◇ Handle mistakes, missteps and failures as learning opportunities

### Trainer Notes

5 minutes

*Introduce yourself and provide a brief background if participants don't know you. Go over logistics (schedule, breaks, restrooms, etc.) and any ground rules for the day. Typical ground rules include no electronics in use, show respect for every participant, participate fully, no dominating or interrupting, etc.*

*Review the course objectives with participants.*

Delegating for Growth

### Course Objectives

- Recognize delegation as a tool for employee growth
- Prepare yourself to delegate effectively
- Assess your employees to determine their delegation needs
- Match employees and projects appropriately
- Identify barriers to delegation and overcome them
- Apply the steps to delegating effectively
- Handle mistakes, missteps and failures as learning opportunities

# Your Attitude Toward Delegation

*Instructions: Read each statement and choose the answer that most closely matches your current attitude and approach toward delegation.*

	Almost always	Sometimes	Never
1. I delegate on a regular basis, not just when I'm overloaded.			
2. I delegate to the one or two people I know will do a good job.			
3. I ensure that employees have all the necessary resources (time, budget, equipment, training, etc.)			
4. I worry that an employee may be more competent at a task than I am.			
5. I am prepared to accept responsibility for any complaints.			
6. I worry that the employee won't give the task or project the same attention I would and won't do as good a job.			
7. I believe the benefits of delegating outweigh the extra time it may take for me to start the delegation process and for the employee to complete it.			
8. I feel guilty about delegating tasks to busy employees.			
9. I see delegation as an opportunity to develop all team members.			
10. I assume employees know when they've completed the task successfully.			

**Trainer Notes**

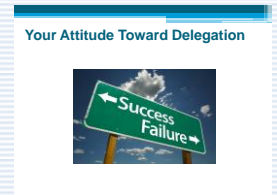
5 minutes

*Self-assessment: Allow several minutes for participants to complete the self-assessment.*

*Ideally, the odd numbers would be answered "almost always" and the even numbers would be answered "never."*

*Debrief by asking participants in what aspects they are struggling and where they are successful.*

*You can also use this as an ice-breaker and have participants share with a partner or in a small group.*



# Barriers to Delegation

## Which of the following describes you?

- ◇ “I can do it myself better and faster.”
- ◇ “What if I’m not needed?”
- ◇ “What if they do it better than me?”
- ◇ “I can’t give up control over the final product.”
- ◇ “What if they don’t do it right?”
- ◇ “People will think I’m just trying to lighten my workload.”

## Activity

Instructions: Replace each barrier statement with positive self-talk.

Barrier Statement	Positive Self-Talk
“I can do it myself better and faster.”	“In the long run, I will create more time for myself and my employees will have more skills and value.”
“What if I’m not needed?”	“I will pursue new projects that add value to the organization.”
“What if they do it better than me?”	“I will focus on projects that take advantage of my natural strengths.”
“I can’t give up control over the final product.”	“I’m only letting go of the process, I’ll still establish guidelines for the result.”
“What if they don’t do it right?”	“My way is not the only way.”
“People will think I’m just trying to lighten my workload.”	“I delegate continuously and not just when I’m overwhelmed.”

### Trainer Notes

15 minutes

If we all know that delegation is a good idea, why do we resist it? Review the most common excuses listed.

Activity: Have participants work with a partner or in small groups and come up with positive self-talk to overcome the barrier statements listed.

“I can do it better and faster.” This is short-sighted. Delegation will produce big benefits in the long run.

“What if I’m no longer needed?” Use your freed up time to pursue new, innovative projects that will add value to the organization.

“What if they do it better?” Then you can focus your time and talents in areas that are your natural strengths.

“I can’t give up power and control.” It can be difficult to let go; however, remember you can and should establish guidelines over the result. Just let go of the process.

“What if they don’t do it right?” What you really mean is, “What if they don’t do it my way?” Realize that your way is not the only way to achieve the result.

“People will think I’m just trying to lighten my workload.” If you are truly delegating and not dumping, people will not view it that way.

### Barriers to Delegation



- Excuses
- Attitudes
- Fears

## Deciding What to Delegate

- ◇ Routine activities: fact-finding assignments/data collection, preparation of reports, problem analysis
- ◇ Activities that aren't part of your core competencies. Examples: Accounting, IT—hardware and software, administrative—organizing, travel arrangements, contract preparation
- ◇ Tasks and responsibilities you were promoted from

### What not to delegate

- ◇ Performance issues
- ◇ Disciplinary actions
- ◇ Politically sensitive issues
- ◇ Emergencies where there's no time to explain or train

### Activity

Task/Project	Can it be delegated?	If no, why not? Is it a legitimate reason?	What skills does this task develop?

#### Trainer Notes

15 minutes


*Most tasks and projects can be delegated. In particular, if you find yourself doing the tasks and activities you were promoted from, that's a clear sign of items you should be delegating.*

*Review the list of things that should not be delegated—performance issues, disciplinary actions, politically sensitive issues and emergencies where there's no time to explain or train.*

*Activity: To get you thinking of things to delegate, review your schedule/planner and make a list of your daily tasks and activities. Decide if it can be delegated. If not, list the reason and decide if it's a legitimate reason or if one of the barriers is causing you to hang on to it. Finally, list the skills the task/project will develop and how it will enhance an employee's development.*

*Debrief by having participants share their insights.*

**What to Delegate**




Almost everything!

---

**What Not to Delegate**

- Performance issues
- Disciplinary actions
- Politically sensitive issues
- Emergencies





## Delegation Don'ts

- ◇ Avoid setting up others to fail
  - Make sure the employee has the necessary resources (more on that later), especially time. Avoid delegating at the last minute.
  - Be available (more on communication later)
- ◇ Avoid dumping
  - Make sure to hand off projects that support the development and growth of your employees, not merely the projects you don't want!
- ◇ Avoid micromanaging
  - Don't be a "helicopter" manager and hover over the employee
- ◇ Avoid delegating only when overworked (delegate on an ongoing basis)

*"The best executive is the one who has sense enough to pick good men to do what he wants done, and self-restraint enough to keep from meddling with them while they do it."*

*Theodore Roosevelt*

### Trainer Notes

10 minutes

*Avoid setting others up to fail: If the employee doesn't have the necessary resources and the necessary authority (more on that later), the delegation process will be doomed to failure. This includes delegating at the last minute—that's a sure-fire way to set someone up to fail.*

*Avoid dumping: Connect the delegation to the employee's individual development plans so they see a personal benefit to taking on the work.*

*Avoid micromanaging: Resist the urge to interfere—it is no longer your work!*

*Remember to continue to delegate—don't just go through this process once and consider it done. Over time, consistently delegating an increasing level of discretion to your employees will develop their skills and knowledge.*

#### Delegation Don'ts

- Setting up others to fail
- Dumping
- Micromanaging
- Delegating only when overworked



## Identify Boundaries

- ◇ Establish the lines of authority, responsibility and accountability
- ◇ Identify what is specifically included in this assignment/project
- ◇ Identify what is specifically excluded in this assignment/project

## Levels of discretion/autonomy

- ◇ Investigate options and recommend a solution. Manager decides.
- ◇ Act, then report immediately
- ◇ Initiate, take action and report routinely

In all cases, ultimate accountability remains with the manager.

### Activity

<b>Project, Task or Activity:</b>	
<b>Employee name (optional):</b>	
<b>Investigate &amp; recommend</b>	
<b>Act, then report immediately</b>	
<b>Initiate and report routinely</b>	

### Trainer Notes

10 minutes

**Identify boundaries:**  
 Successful delegation can be as much about knowing what NOT to do as knowing what to do. Make sure you have determined these parameters, and that the employee knows them.

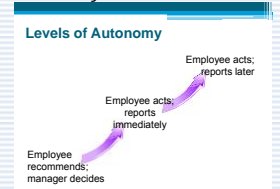
Determine level of discretion or autonomy in conjunction with the employee—ask them what level they feel comfortable with.

Some useful questions that may help you determine the most appropriate level:

“What questions do you have?” “What did I leave out?” “What would you like to review?” “What will your first step be?”

**Activity:** To help determine the various levels of autonomy, look at a task or project to be delegated and describe what each level would look like for that project. Debrief by sharing examples among the group.

Alternatively, list a task/project that you will delegate. Identify an employee for whom this would be an appropriate task to take on. Identify the boundaries of this project and the level of discretion/autonomy you are comfortable with



## Anticipate problems

Problem	Solution
Manager and employee can't agree on the specifics of the delegation	<i>Review and clarify objectives. Focus on outcome, not process</i>
Employee keeps coming back for advice and help.	<i>Ask them to come to you with a proposed solution. Reinforce good ideas and help them build confidence.</i>
Employee's performance is jeopardizing a successful outcome.	<i>Don't panic! Change the level of authority and provide more support.</i>
Deadlines are not being met.	<i>Identify reasons and take corrective action. Implement more frequent check-ins.</i>

*Teach employees how to be problem solvers. Resist the temptation to tell employees what to do. In fact, resist offering advice and suggestions until you ask employees for their ideas on how to fix the problem.*

### Trainer Notes

10 minutes

*If a specific task is not going well, look for potential problems and correct them before they escalate into big trouble.*

*Activity: Have participants work with a partner or in small groups to come up with potential solutions for each problem. Debrief by sharing with the entire group. Note: We've listed one possible solution for each problem.*

#### Anticipate Problems



## Activity: Sharing Expectations

Area	Expectation
Objective/outcome:	
Success indicators:	
Share the big picture:	
Deadline and interim milestones:	
Boundaries—what is specifically included and/or excluded:	
Level of autonomy/discretion:	
Method and frequency of communication:	
Expected level of supervision:	
Method and frequency of feedback:	
Available resources:	
Work review/project sign off:	
Training and development needs of employee(s):	
Potential reward for employee(s):	

### Trainer Notes

20 minutes

*Activity: Sharing Expectations. Purpose To practice using the steps of delegation and spot any potential areas for improvement, especially in the area of communication.*

*Instructions: Ask participants to look back at their list of tasks, activities and projects they plan to delegate and choose one for this exercise. Allow about ten minutes for participants to complete the chart on this page. Then, have them work with a partner and role play a meeting with the employee they plan to delegate to. The person serving in the role of the “employee” should ask questions or clarify concerns. In this way, the “manager” can see where he/she might be falling short in communicating the full delegation picture. Switch roles so every participant has a chance to practice.*

# Help Employees Learn from Mistakes

## Four-step process of learning from mistakes

### 1. *Admit your part*

- ◇ How did your actions (or lack thereof) contribute to the situation?

### 2. *Fix what can be fixed*

- ◇ Usually, an apology is a good first step. Apologize to whomever was negatively affected by the situation.
- ◇ Work in the short run to minimize the negative effects or consequences of the situation
- ◇ Don't obsess over what you can't change

### 3. *Visualize a different outcome*

- ◇ Picture a successful outcome
- ◇ Working backward from that, what different decisions and actions along the way would have contributed to that success?

### 4. *Share and apply*

- ◇ Allow others to learn from your mistakes; share your experience
- ◇ Ask, "What can we change or fix based on what we found?"
- ◇ Make certain you are not merely focused on quick fixes that address symptoms instead of underlying causes

#### Trainer Notes

10 minutes

*So you let the employee make a decision that didn't turn out well. What can you do to minimize the consequences and ensure that the employee learns from the experience?*

*It's helpful to know that our brains are wired to learn from failure, both as children and as adults. How we deal with failure is a big factor in determining future performance.*

*In How We Decide, Jonah Lehrer describes research in which students are given a test and, after grading, are praised for their results. One group was praised for their intelligence while the other group was praised for their effort. The latter group outperformed the "smart" group in subsequent testing. The reason they did better was because they spent more time looking at their mistakes and learning from the work of those who did better. The "smart" group tended not to engage in critical self-examination.*

*Review the four-step process for learning from mistakes.*

#### Learning from Mistakes

- Admit your part
- Fix what can be fixed
- Visualize a different outcome
- Share and apply



## Course review

1. Fill in the blanks. True delegation means giving up a little of what you would like to hold on to ( \_\_\_\_\_ ), while keeping what you might prefer to give up ( \_\_\_\_\_ ).
2. List three benefits of delegating:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. Which of the following is NOT a common barrier to delegation?
  - a. "I want to empower my employees."
  - b. "People will think I'm just trying to lighten my workload."
  - c. "I can't give up control over the final product."
  - d. "I can do it better and faster myself."
4. List two examples of tasks that should not be delegated.  
\_\_\_\_\_  
\_\_\_\_\_
5. What of the following is NOT a cardinal sin of delegating?
  - a. Micromanaging
  - b. Delegating only when overworked
  - c. Delegating the "what" and not the "why"
  - d. Dumping

### Trainer Notes

1. control, accountability

2. Any three of the following: Improve your own productivity, build your skills as a manager, create time to work on projects that add value to the organization, empower employees, increase their competence and confidence, build a stronger overall team, increase productivity and effectiveness of organization, build collaboration and cooperation, groom successors

3. a

4. Performance issues, disciplinary actions, politically sensitive issues, emergencies where there's no time to explain or train.

5. c

## What our Clients Say about the Reproducible Training Library

“I have used many of the *Reproducible Training* programs and I can't say enough good things about them. The content is easy to tailor—I've even combined programs to meet my clients' specific needs. Not only am I able to provide my clients with a professionally developed, customized program at a reasonable price, but I've saved myself a lot of time and frustration, too. I plan to buy more programs in the future. I highly recommend them!”

Rosemary C. Rulka, MS, SPHR  
President  
R.C. Rulka Consulting, LLC

“We chose the *Reproducible Training Library* for the open-source format and customizable materials. The programs are well structured and rich with content. Preparation to delivery was less than 2 hours, and the addition of our company themes make the materials look like they were designed in house.”

James T. Puett  
Manager, Leadership and Organizational Development  
Healthways Human Resources

## Delivering high-quality, customized training has never been simpler.

The *Reproducible Training Library* is your comprehensive source for soft-skills content that's downloadable, customizable, reproducible, and affordable. From communication and leadership to team building, negotiating, and more, our experts have done the development work for you. Whether you use the materials “right out of the box” or tailor the content to your needs—download to delivery takes just a few clicks.

### Features and Benefits

- *Instant Access:* Your program is available to you for immediate download.
- *Quality Content:* Top-notch development enables you to deliver a rich program.
- *Ability to Customize:* Make the program yours, or use it “right out of the box.”
- *Unlimited Use:* Reprint the materials as much as you like, as often as you like.

### Get Started Today!

### Have questions?

Contact us at 0040 734 350 525 or [office@dekon.biz](mailto:office@dekon.biz).