

Delegation

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Introduction

Delegation is a portion of building an awesome team.

As a manager, it is very tempting to tackle a challenge yourself rather than coaching an employee to do it.

Don't give in to the temptation, as the benefits of delegating effectively will far outweigh the short-term set backs.



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Introduction

This presentation aims to:

Offer you guidelines and tips on making delegation easier and more effective.



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Overview

- Warning signs of delegation
- Step by step process
- Decide on level of authority
- Provide support and coaching
- Agree on parameters for follow-up and feedback
- Set the tone
- From Theory to Reality



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Warning signs

- Your inbox is always full
- Morale is low and staff turnover on the rise
- Delegated tasks are incomplete and deadlines are being missed
- You intervene in tasks or projects delegated to staff



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Warning signs

- You second guess staff assignments and often redo them yourself
- Your staff members are not taking responsibility for tasks or projects that you have delegated to them

Should any of these “warning signs” sound familiar, it means that you are either not delegating at all, or not effectively enough



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It's a step by step process

8. Agree on parameters for feedback and follow-up
9. Review the results



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1. Clarify the purpose for the delegation

- Before delegating any task, first clarify the purpose for the delegation

- Is it to build skills and experience for staff members?

- Is it to lessen your workload?

- Is it to provide staff with visibility and recognition?



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2. Determine the tasks you wish to delegate

- You will never be able to delegate until you are comfortable with the fact that your team will only ever be able to do the job 80 % as well as yourself
- Be open to delegating projects or functions that require some skill development of a staff member
- By doing so, you can add variety to staff workload and provide a motivational challenge to the right personnel



"I start my day by making a list of everything I need to do . . . and who I can get to do it for me."

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2. Determine the tasks you wish to delegate

- Identify tasks that can easily be done by staff on a routine basis

Routine tasks



- Identify specific projects or assignments that can easily be delegated with a start and end date

Specific Projects



- Identify those assignments or tasks that require specific skill outside your ability or expertise

Tasks requiring skills outside your department



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3. Clearly describe the task at hand

- Clearly describe the task or function
- Define the purpose of the assignment and how it fits into the big picture
- Identify roles and responsibilities
- Discuss deadlines
- Disseminate information



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4. Tasks that are not advisable to delegate

- It is not advisable to delegate your managerial responsibilities such as:
 - Human resources issues (employee evaluations, hiring and firing etc)
 - Sensitive or confidential issues
 - Planning, directing and motivating your team
 - Complex customer negotiations
 - Tasks that require your specific set of technical skills

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5. Determine what skills and capabilities will be required

...to complete the task successfully...

Compare:

Skills required	Capabilities of each staff member
Analyse the work involved:	Availability (time) of staff member
What activities will need to be performed, what sort of thinking skills will be needed, what interpersonal skills are needed? Will I need to provide training ?	Initiative shown What level of assistance will he or she require in order to complete the task successfully What level of authority can I grant to him or her?



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6. Match the task to the right individual

- This is a managerial skill that will reflect your ability to make the right decisions and set goals
- Consider any previously expressed needs or desires communicated by staff to you in developing their skills and experience



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7. Is training needed?

- If the task requires training, in order for the staff member to develop new skills, agree on an appropriate plan for training
- Agree a schedule for coaching and training



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Decide on level of authority

- The amount of authority you give a staff member depends on his or her capabilities and your level of confidence in him or her
- Consider the risk involved
- Determine the *minimum* amount of authority you will need to delegate in order for the task to be completed successfully
- There are six levels of authority:



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Six Levels of Authority

Level One – “Report all the facts to me, then I’ll decide what to do.”

Level Two – “Report all the facts, identify alternative actions including the pros and cons of each and recommend one for my approval.”



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Six Levels of Authority

Level Three – “Report all the facts, identify alternatives including the pros and cons of each, let me know what you intend to do, but don’t take action until I approve.”

Level Four – “Report all the facts, identify alternatives including the pros and cons of each, let me know what you intend to do and do it unless I say no.”



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Six Levels of Authority

Level Five – “Collect all the facts, identify alternatives including the pros and cons of each, decide what to do, take action and then let me know how it turns out.”

Level Six – “We’ve discussed the issues. I trust your judgment and know that your decisions will be made in the context of our visions, values and strategy. No further contact with me on this issue is required.”



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Provide support and coaching

☐ Strike a balance between:

Being intrusive

Peering over the person's shoulder

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Providing support and coaching where needed

Allow the person to use their intelligence and make their own decisions

- Provide resources & information
- Provide advice only when requested
- Focus on results not methods used to achieve them



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Agree on parameters for follow up and feedback

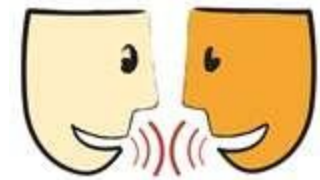
- Create clear guidelines for follow-up, monitoring and feedback
- Establish a formal system for reporting of progress on a regular basis
- If clearly defined at the outset, your feedback will be seen as less intrusive
- Clearly define expected outcomes and measures of success
- Define at the outset, what steps will be taken should the task run into difficulties



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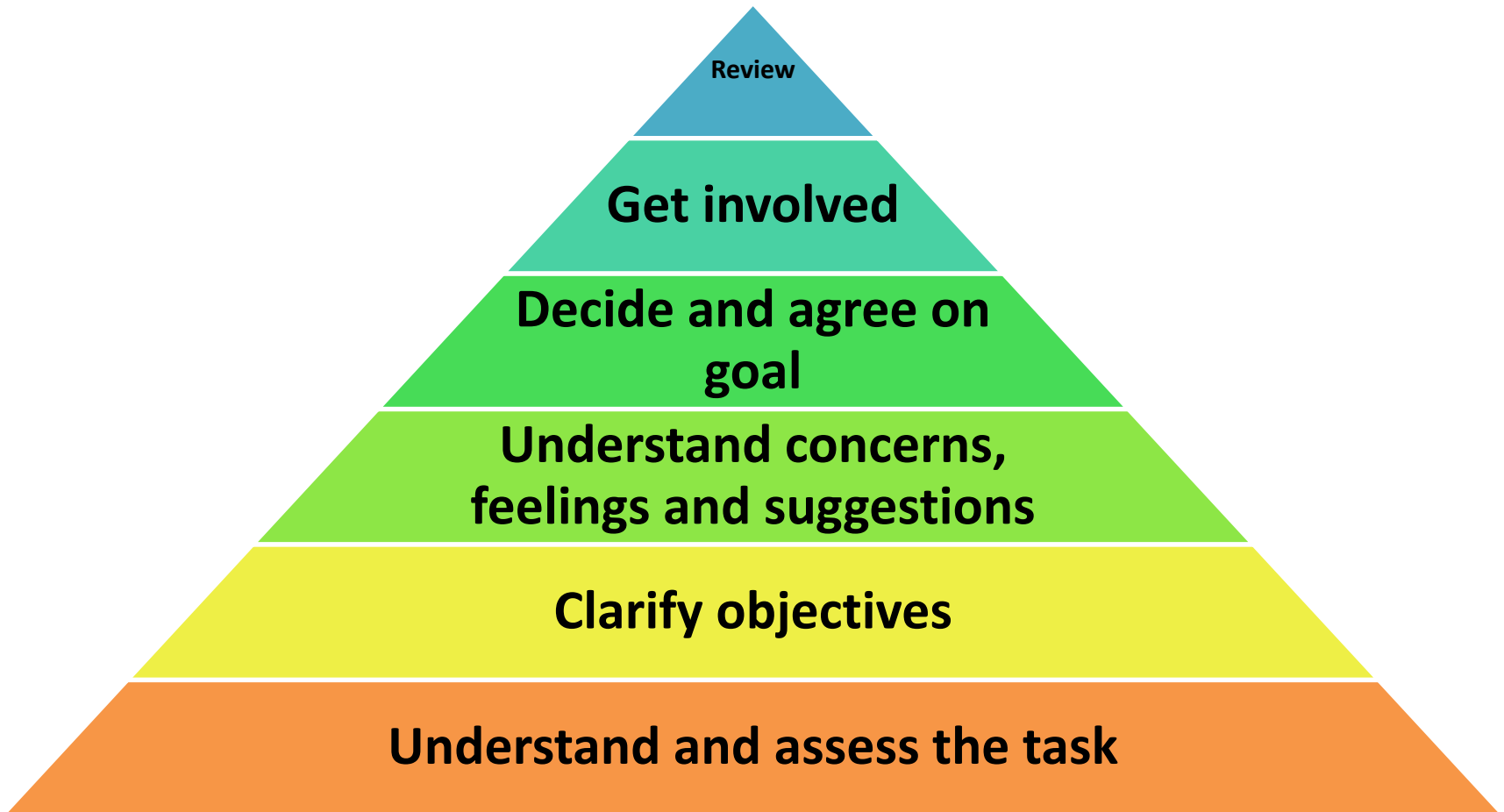
Communication is key

- Once you have identified the task to delegate and identified the staff member, have a face to face meeting with him or her, setting out clearly all the components of the delegation process. Follow this up with a memo outlining the key points
- Once you have decided on the level of authority you will delegate – communicate this to everyone involved
- Be clear with the staff member about his or her accountability in meeting the standards you have agreed upon
- Keep the lines of communication open at all times
- Let your staff member know that they can approach you at any time if they have problems



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Delegation Steps: Summary



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Set the tone for delegation

To retain an awesome team, leadership must:

Foster great communication and continuous learning

Provide coaching

Ask for ideas about how to grow people and the company, encourage staff to share their special interests and time availability for new projects



Build trusting relationships

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Set the tone for delegation

To retain an awesome team, leadership must:

Avoid dumping just tedious or difficult tasks on staff

Try to delegate projects that spark interest

Try to delegate projects or tasks that pave the way for career development

Try to delegate very structured assignments to a less skilled staff member, provide support - so as to build confidence and competence



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From Theory to . . . Reality

1. Select the team member
2. Select and define the task
3. Determine the delegation level
4. Perform the assignment
5. Review the results
6. Consider modifying the delegation level



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