# HilaryGee
Developing Leaders, Managers & Teams

*Training    Coaching    Facilitation    Team-Building    Change    Consulting*

**Think**          *Increasing success by changing how you...*          **Act**

**Feel**
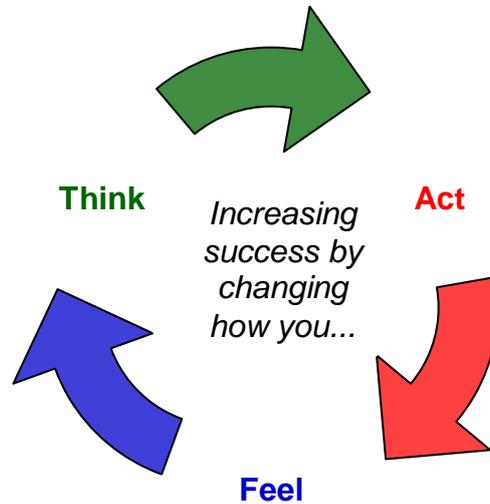
## "The best trainer & training I've experienced."
*Blue chip company manager,*
*after Senior Management & Leadership Development Programme*

Facilitation

Consultancy

Training

Coaching

## *"Above all fantastic coaching"*
*Change Manager, Large Public Sector Client*
*Feedback from consulting sessions during a large change project.*

# Delegation – self-study exercises, models and template

| What is delegation? |
| :--- |
| |

**What are the benefits of delegating?**

- For the manager…
- For experts in the team…
- For non-experts in the team…
- For customers…
- For the business…

## Objectives – The Key To Good Management/Delegation

*If your team does not know where you want them to go, they'll end up wherever they're heading!*

Clear objectives are a critical success factor for managers.  They provide people with a clear path towards success.  Lack of objectives or lack of clarity in objectives ensures confusion.

| So, what makes an objective good? |
| --- |
| |

## Exercise 1

Thinking of examples from current or previous jobs, write down two objectives: one you have been set by someone else (manager/customer/supplier/ colleague) and one that you have set for someone else (direct report/ colleague/supplier/customer).

| An objective you have been set by someone else |
| --- |
| |
| An objective you've set for someone else |
| |

## Exercise 2

Think of an objective/task that you can set for someone else in the training course.  The task must only take them a very short time to complete and you need to be prepared to take about 1 minute to explain it to them.  The trainer will pair you up with someone in a couple of minutes.  Jot down your idea in the space below:

| |
| --- |
| |

## What Motivates & Demotivates People Being Delegated To

When being delegated to, people feel motivated or demotivated by the content, style and process. The key things people say about motivators/demotivators include:

| Motivators | <ul><li>I understand the purpose and the bigger picture</li><li>I can see how useful it will be</li><li>I understand the outcomes required</li><li>I understand the processes I need to follow</li><li>I have a clear plan – or I know I can create one</li><li>I believe I can do it / it seems straightforward</li><li>The delegator checked I understood and was confident</li><li>I know I can ask questions and I will be given calm, useful non-judgmental answers</li><li>The delegator is polite and friendly when delegating</li><li>The delegator checks my concerns & the support I need</li><li>The task/the way it was delegated show real understanding of (or tailoring to) me, my likes, my interests and my career development</li><li>It's reasonably stretching for me (learning)</li><li>I know that my efforts will be appreciated</li><li>Not too stressful / it'll fit it in with my other commitments</li><li>It's different – I like variety</li><li>I know I can go back for support or clarification</li></ul> |
|---|---|
| Demotivators | <ul><li>I don't understand the point of this</li><li>I don't know how to do this / this'll never work</li><li>I'm not sure I can do this / I can't do this</li><li>The consequences of making mistakes are significant and I won't be supported</li><li>Why I am doing this? (No link to any stakeholders)</li><li>I feel awkward/scared/embarrassed trying something new</li><li>I couldn't ask questions/ check my understanding</li><li>Too much/not enough detail given my experience/lack of it</li><li>I'm not sure if I'm allowed to ask for help or who to ask</li><li>The person delegating this was rude or showed no interest in me as a person</li><li>The task has no relevance to my job or career or interests</li><li>Same old, same old</li><li>I always get this task...can't someone else do it?</li></ul> |

*Consider what that means you could improve when you delegate.*

## How To Set A Good Objective

In order for objectives to be good, they must be clear for both the manager and the member of staff both at the outset and when the time comes to review, coach and feedback on performance.  A very useful acronym to help you ensure that your objectives fit that description to make sure that they are SMARTER, that is to say that they meet the following criteria:

# Specifics – enough for delegate to succeed

# Measures – what does success look like?

# Agreed – delegate really buys into it

# Relevant reasons - what's in it for me?

# Time-frames - deadline, duration, start-point, checkpoints, milestones

# Engaging - stretching, esp. valuable, different etc

# Recorded – if crucial, complex, change from past or if "they" are unreliable or forgetful!

Now review the objectives you wrote on the page 3 and see if you can make them SMARTER now.

*What other objectives set for you or by you for others needed to be made SMARTER?*

*To improve my own delegation, I should…*

Keep on…

Increase…

Stop…

Start…

## What stops you from delegating more or better?

So, what are the actions you could take to reduce those barirrers?

### Key activities in delegation – Planning, Organising, Supporting, Reviewing

1. **Planning**- What to delegate (outcomes/results, not processes), to whom, why and how?

2. **Organising -** the "Briefing session" - how to energise & empower (motivation confidence and discipline)

3. **Supporting** - training, resources, ongoing meetings, coaching, checkpoints, milestones, review process and timing,

4. **Reviewing** - to highlight outcome successes/short-comings, behavioural successes/learning points, future actions to improve results and develop the person/team

# Four Main Reasons For Failure

The four main reasons in explanations given by people analysing performance failure are as follows:

| Reason | Your notes | Your plans for improvement |
|---|---|---|
| 1.  Unclear goal | | |
| 2.  Unknown actual performance | | |
| 3.  Can't | | |
| 4.  Won't | | |

**Four Main Reasons For Failure**

## Delegation Levels Based On Situational Leadership

Managers should delegate using appropriate situational leadership styles to provide the right level of direction for the person in the situation.   While, you need to decide about each task on a case by case basis (i.e. situationally), there is a useful model of 6 broad levels of delegation (see below).

Each level has its own potential risks and benefits:

- **Potential risks** include reduced creativity or learning, more errors, time invested delegating and delivering, demotivation and loss of confidence
- **Potential benefits** include increased confidence, control, structure, consistency, learning, empowerment, responsibility, motivation & creativity

Decisions you make should reduce the right risks and maximise the right benefits to all stakeholders in the short, medium & long-term.

| Level - description | Message implied or made explicit |
|---|---|
| 1.  Here's a goal & process for task & supervision | This is new for you, it would be impossible for you to work it out by yourself (in the time available) so I need give you clear instructions for your actions and the results |
| 2.  Consult with me to plan it and keep me informed | You have some relevant knowledge and experience, so we should plan it together, but it's new/complex enough for you/me that I want us to combine our experience and agree the support you'll need to achieve the outcomes and be clear how we will measure the success of your work. |
| 3.  Plan it and check with me before you do it | I think you can do this yourself, but I'd like to get a sense of your plan to see if I can add value to it and so that we can both be sure it covers everything necessary…also I may want or need to talk to other people about it. |
| 4.  Do it and tell me about it afterwards | We both believe you can do it with minimal help and that if you need help, you'll seek it out. I'd like to hear how it goes so that I can make progress with other things or so I can usefully coach (and praise) you. |
| 5.  Could you take this on, please? (*Just Do It* politely) | Level four assumptions, plus you'll know whether you need to keep me posted on progress/completion, because you have a good understanding of the big picture and your own feedback/coaching needs. |
| 6.  Can you take over the responsibility for this from now on? | Level five is a given and you are ready to take charge complete of this and I shouldn't be involved on a systematic basis, it would waste our time and energy. There may be regular reporting procedures defined, or it may just be a case of reporting when things go wrong. |

For example, someone who has:

- never done a task before and needs lots of structure - level 1 could fit,
- a little relevant experience & who learn well by discussion - level 2 might fit
- competent & confident, not quite ready to "fly solo", level 3 could fit…etc

## Assessing Skill & Will Situationally

Different people have different levesl of ability (skill) and commitment (will) to different tasks.

The combination of will and skill lead to different delegation levels being appropriate.  So, assessing  level of skill and will becomes important in deciding how to delegate well to a given person in a particular situation.

### When assessing *skill* use TRUE:

- **Trained** – have they been trained to do this task?

- **Realistic role revelance** – do they understand how that skill is applicable to this task?

- **Understand** – can they explain their understanding of the what, why and how to achieve the clearly defined measures of success?  Can they identify and talk though the risk-management plan?

- **Evidence** – is there evidence of them having successfully completed this task before to your required level of excellence?  (Preferably recent and repeated successes!)

### When assessing *will* use WISC:

- **Willing** – do they like the task?

- **Incentives** – are the net incentives (tangible and abstract) positive for them?

- **Secure & safe trying** – are the negative consequences and costs of trying sufficiently low for them to feel okay about having a go?

- **Confident** – how confident are they that they can succeed? (Score 1 to 10 and ask "how can you, I or others increase that score?")

These questions will help you decide how much technical and how much motivational/confidence-building input they will need, so you can then adapt your style accordingly.

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### Delegation Process

Thinking of a task you'd like to delegate to someone, follow the steps below to improve your planning and delivery of the task-setting process.

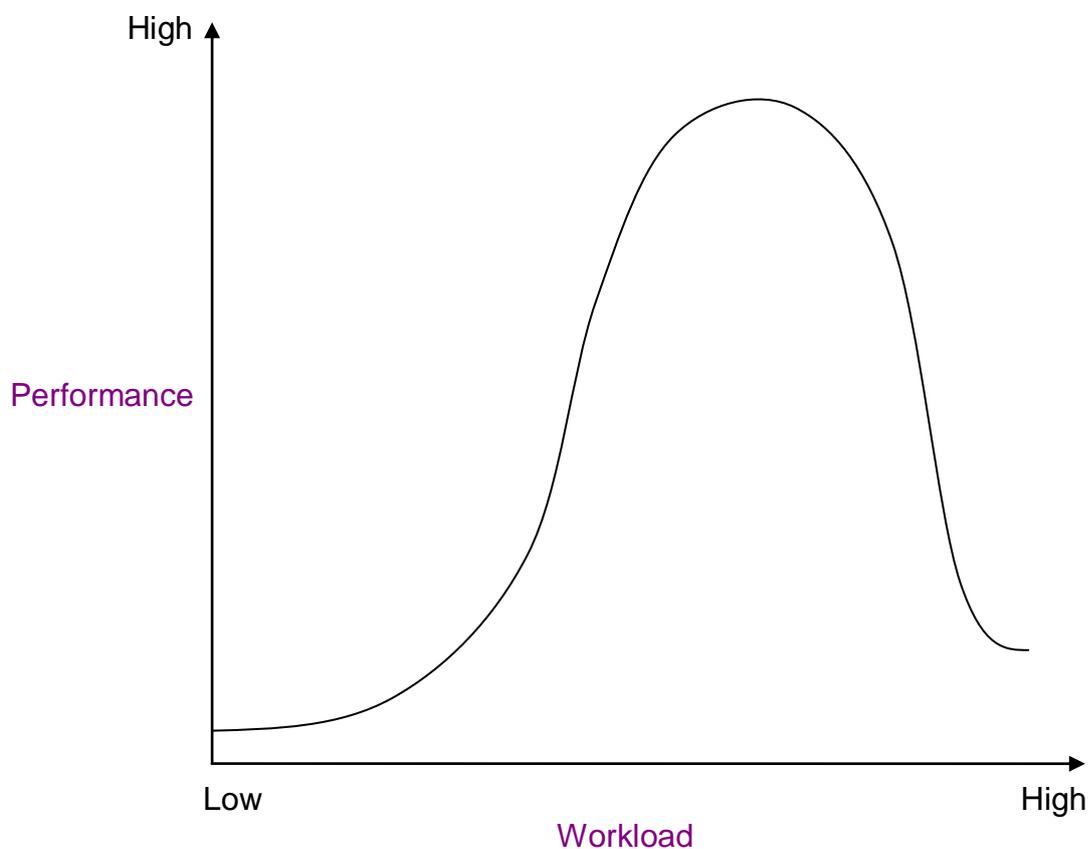| | |
|---|---|
| Task to delegate? | |
| Why? | |
| To whom? | |
| Why to that person? | |
| Level to pitch it at? | |
| How will you reduce risks and maximise benefits to stakeholders in the short, medium and long-term? | |
| Plan your briefing session, using the following steps: | |
| 1. Set the scene | |
| 2. Get their involvement in defining the outcome | |
| 3. Discuss and agree the purpose, measures, resources and constraints – SMARTER goals | |
| 4. Agree support (and monitoring) schedule - appropriate for the person, the task and situation? | |
| 5. Agree review date | |
| 6. What questions/concerns do they have? | |
| 7. Test understanding of all the above (use coaching questions) | |
| 8. Clarify in writing if necessary (or get them to) | |

**Simple version of this is STAR =** *Situation, Task, Actions, Review*

## How to delegate the right amount

> There are certain things a manager should not delegate...what are they?

### Peak performance

Apart from the above, achieve peak performance as a manager; you should try to get everyone in your teams achieving their peak performance. In deciding how much to delegate to each person on their teams, understanding the peak performance curve and individual differences on it can help:

High

Performance

Low                                                                 High

Workload

*Consulting, facilitating, training and coaching – improving mindsets, frameworks, behaviours & results*
*Developing Leaders & Teams,  Consulting for Organisational Development & Change*
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## Defining the outcome clearly - an alternative approach

SMARTER is a very useful approach to objectives, especially if managers use it and the situational leadership model in conjunction. Some managers end up using SMARTER purely in a "*telling*" mode…with too much detail about the process and not enough reference to the big picture for the person, stakeholders etc. Micro-management is not leadership!

Defining the outcome very clearly and persuasively can be improved using the *pull* technique or mode (i.e. through *asking*) - and PECSAW is the NLP approach. Using the PECSAW template below, coach a partner through a challenge they've been wanting to overcome or a goal they want to achieve that they need to work on. This is especially useful for mindset/habit changes.

| | |
|---|---|
| **P**ositive<br>Couch the goal in positive terms. | |
| **E**vidence<br>How will you know that you've achieved your goal? How will others know? | |
| **C**ontext<br>(where & when) | |
| **S**elf Achievable<br>Make the outcome really totally within your control? Or If not, change the goal to something that is. | |
| **A**dvantages/<br>**Disadvantages** | |
| **W**orthwhile<br>(What benefits to whom) | |