

Organization Name – Lesson Plan

Course Title: Delegating Essentials
Instructor/Developer: Margie DeBroux
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Learning Objectives (LO)

LO #	Learning Objective in PW	Short Learning Objective
1	Define delegating and examine its benefits to managers, employees, and the organization	Define delegation and examine its benefits
2	Assess current delegation skills and experience	Assess delegation skills/experience
3	Utilize effective communication throughout the delegation process	Communicate effectively throughout process
4	Apply an eight-step process for delegation success	Apply an 8-step delegation process
5	Incorporate the five levels of authority model when delegating	Integrate the 5 levels of authority model
6	Practice delegation skills, using a checklist of delegation behaviors	Practice skills with checklist
7	Understand delegation resistance and develop appropriate strategies to overcome employee resistance.	Overcome resistance

Note: The “Identify Tasks to Delegate” and “Select Person for Task” activities are listed as being related to LO 6, because they are activities that have on-the-job application.

Lesson Plan

Time	LO #	Name of Topic; also list breaks	How Does this Topic Support the LO?	Class Activities (PPTs used, key points, discussions, group assignments, readings, handouts, etc.)	Slides Covered	Participant Workbook covered	How is Learning Assessed?
15	All	Introduction	<ul style="list-style-type: none"> •Gain attention for course •Learn about course participants •Summarize learning objectives 	<ul style="list-style-type: none"> •Introduce yourself •“Delegate” introductions to class <ul style="list-style-type: none"> ○ Blank paper to give to another person ○ In pairs, introduce themselves ○ As class, present slide that has point about “dream task to delegate” ○ Ask for volunteers to present partner ○ Individuals introduce themselves ○ Discuss how they feel about the “delegated” task •Present objectives 	1 - 4	2, Classmate Introduction Handout	•Discussion
5 (20)	1	Delegation Definition	<ul style="list-style-type: none"> •Definition of delegation •Purposes of Delegation (Is/Is not) 	<ul style="list-style-type: none"> •Video – What is Delegation? (1:10) •Discussion 	5-6	3	<ul style="list-style-type: none"> •Discussion •Responses in PW
10 (30)	2	Self-Assessment	<ul style="list-style-type: none"> •Discuss whether delegation is a skill or talent •Conduct self-evaluation 	<ul style="list-style-type: none"> •Transition to topic – With this definition, ask if delegation is a skill or talent. Now, let’s assess ourselves. •Complete self-assessment in Participant Workbook •Discuss responses 	7	4-5	<ul style="list-style-type: none"> •Self-assessment •Discussion

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15 (45)	1	Delegation Benefits	<ul style="list-style-type: none"> •Role of manager to work through other people •Delegation benefits the manager, employees, and the organization. •Describe why managers/supervisors are reluctant to delegate 	<ul style="list-style-type: none"> •Discuss role of manager •Participants brainstorm benefits of delegation for manager, team, and organization •View video – Delegation is Great (3:09) •Class discussion about benefits • View video – The Art of Delegation (2:45) •Identify reasons why person in video was reluctant to delegate •Discuss counterpoints to reasons for being reluctant to delegate 	8-11	6-7	<ul style="list-style-type: none"> •Discussion •Responses in PW
5 (50)	1, 6	Action Plan: Identify Tasks to Delegate	<ul style="list-style-type: none"> •Discuss which tasks are good to delegate and those that should not be delegated. •Identify on the job tasks that can be delegated 	<ul style="list-style-type: none"> •Discuss criteria to determine whether tasks would be good to delegate and those that should not be delegated. •Participants begin developing action plan by identifying tasks that could be delegated and select 3 of them 	12-13	8, 23	•Action Plan
5 (55)	3	Communication	<ul style="list-style-type: none"> •Discuss components of communication •Discuss how communication is used throughout the delegation process 	<ul style="list-style-type: none"> •Present main components of good communication: clear, complete information; obtain feedback and actively listening; ensure both understand each other •Discuss the communication problems from the introduction activity. •Discuss the role of communication prior to, beginning, during, and end of the delegation process •Discuss consequences of poor communication •Self-reflection: <ul style="list-style-type: none"> ○ Think of a time that you delegated something and it did not go well. What did you think and feel about that time? How do you think the other(s) thought and felt about it? 	14-16	9-10	<ul style="list-style-type: none"> •Discussion •Responses in PW
10 (65)	3, 6	Action Plan: Select Person for Task	<ul style="list-style-type: none"> •Use communication skills to assess employee fit with task. •Assess and select employee(s) to perform the task. 	<ul style="list-style-type: none"> •Discuss communicating with employees prior to the delegation process to determine whether they would be a good fit for a project. •Using one of the selected tasks, assess employees. Then, select one employee to perform the task. 	17-18	24	•Action plan

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5 (70)	4	8 Step Process: Overview	•Describe the 8 step process at a high level	•Describe what occurs in each step. •Explain the purpose of each step. •Transition to Authority	19	11-12	•Discussion •Responses in PW
10 (80)	5	5 Levels of Authority	•Discuss the 5 levels of authority	•Use PW to guide explanation of the 5 levels •Discuss consequences of not communicating authority level •Discuss how to select authority level •Activity: ○ Instructor describes situation ○ Participants determine which level is appropriate	20	13	•Discussion questions about specific situations
10 (90)		Break			21	N/A	
20 (110)	4	8 Step Process: Checklist	•Discuss specific aspects of the 8 step process using the checklist.	•Explain that each step has specific behaviors, which are in the form of a checklist. •Discussion of Steps 1-5 •Presenting Task/Dale Carnegie video (2:45) •Discuss differences between the right way and wrong way for each step. •Discuss Step 6 •Clarifying Tasks/Dana Brownlee video (5:29) •Discuss the clarify tasks questions, •Discussion of Step 7 •Setting Up Accountability/Dorie Clark video (2:18) •Discuss video and methods they have used to monitor a project. •Discuss Step 8	22-25	14-15	•Responses in PW •Discussion
15 (125)	4, 5, 6	Case Study	•Identify and make recommendations on how to improve the case using the 8-step process and levels of authority of delegation.	•Read case study •In groups of 3-4 people ○ Discuss case questions ○ Describe what happened in each step ○ Describe how the manager can improve each step in the process •Debrief case study as a class	26	16-21	•Responses in PW •Small group observation •Class discussion

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10 (135)	7	Overcome Resistance	<ul style="list-style-type: none"> •Discuss employee objections and strategies to deflect them. 	<ul style="list-style-type: none"> •Activity: •Discuss how to handle objections listed in PW •Discuss objections that participants have had. As a class, develop strategies to deflect them. 	27	22	<ul style="list-style-type: none"> •Discussion •Responses in PW
10 (145)	4,5, 6	Action Plan: Develop Plan	<ul style="list-style-type: none"> •Implement level of authority and 8 steps into action plan •Aid in transferring learning to work environment. 	<ul style="list-style-type: none"> •Fill in action plan for selected task/employee <ul style="list-style-type: none"> ○ List the level of authority ○ Describe expectations in each of the 8 steps ○ Anticipated objections and potential responses 	28	25-26	<ul style="list-style-type: none"> •Action Plan
25 (170)	4,5, 6	Action Plan: Role Play	<ul style="list-style-type: none"> •Role play the 8 -step process for an employee situation 	<ul style="list-style-type: none"> •Give instructions (2 minutes) •In groups of 3, participants select employee and make a plan using the 8 steps. <ul style="list-style-type: none"> ○ Tell partner about employee and the task to be delegated. ○ Discuss the level of authority, including rationale. ○ Role play the delegation of the task. ○ Partners give each other feedback •Group member rotates. Each role play is 5 minutes (3 X 5 = 15) •Debrief the role play process as a class (8 minutes) 	29	Observation Handouts	<ul style="list-style-type: none"> •Small group observation •Class discussion
10 (180)	All	Wrap Up	<ul style="list-style-type: none"> •Confirm knowledge and encourage transfer to work environment 	<ul style="list-style-type: none"> •Write up the next steps to complete while on the job for the action plans for the remaining tasks. •Encourage participants to work on remaining action plans if they have time. •View Kim Powell's favorite manager video (1:44) •Review objectives •Ask if there are questions •Thank participants 	30-32	27, additional action plans 28-33	<ul style="list-style-type: none"> •Action Plan