

Delegation Essentials

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Objectives:

After completing this program, participants will be able to...

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

What is delegation?

- Delegation is the process of asking another person to do a task, while still maintaining responsibility for that task.
- To delegate, you define the patterns of responsibility, authority, and accountability.
 - To delegate, you must give someone the responsibility to do something that's normally part of your job.
 - It means empowering your employee and giving them the latitude to make decisions and take actions on your behalf.
 - Through the process, they will be held accountable for reaching agreed upon results.
- Delegation is accomplishing organizational purposes through the proper deployment of people.

What is NOT delegation?

- Delegation is not dumping unwanted tasks that you do not want to be bothered with performing.
- It is not giving work to fill someone's time because you have to keep them busy.
- It should not seem like punishment to the employee who has done a good job on another task and becomes overloaded with additional work.

In summary...

The activities that are not delegation will lead to an unmotivated delegate who would rather dodge the work. Always see delegation as a way to expand roles and getting people involved more in the complexity and challenges of what you work on. When delegation is successful, it will allow you, as the manager, to let go.

Notes:

Self-Assessment

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1. Below are other questions to consider in examining if your delegation skills need improvement.

Please check any that apply.

- ☐ Your inbox is always full
- ☐ Only you can do certain tasks so you work overtime
- ☐ Delegated assignments are incomplete and/or deadlines are missed
- ☐ Direct reports feel they lack the authority to complete tasks without your input
- ☐ You second guess your staff's decisions
- ☐ You rework staff assignments
- ☐ Your direct reports feel unprepared to carry out assignments
- ☐ You intervene in assigned tasks
- ☐ Employees do not take initiative on new assignments, they wait until you assign them
- ☐ Employees do not take responsibility for tasks you delegate

Source: Adapted from Managers Toolkit, Harvard Business Essentials, Delegate with Confidence.

2. In general, are you reluctant to delegate? If so, why?

3. What are some things you could delegate but have not?

4. Why haven't you delegated them?

Self-Assessment

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5. What things can you not delegate?

6. What are some things you have already successfully delegated?

7. What process have you used to successfully delegate?

8. What are some things you have delegated unsuccessfully?

9. What could have been improved in those cases?

10. In general, identify your areas for improvement.

Why is delegation an important tool for you as a manager?

- As a manager or you are responsible for achieving organizational goals by efficiently and effectively managing organizational resources. Managers can accomplish this by using the tool of delegation.
- On-going development of your most important resource – your employees – is critical to your role as a manager. Delegation is probably the most available tools for managers to develop their people.

Success in delegation is not measured by how you go about delegating, to whom you delegate, or how often you delegate. Your success will be judged by the **results** you achieve through delegation. If you want to leverage your time, delegation is essential.

The extent to which delegation occurs is a reflection of both the manager's personality and sense of personal competence as well as his or her belief in the competence of his or her subordinates. **A manager who does not delegate is not managing.**

What are the benefits of delegation?

What are some of the ways in which you, as a supervisor, benefit from delegation?

How does your team benefit from delegation?

How does the organization benefit when managers properly use delegation?

Delegation Benefits

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Why are supervisors reluctant to delegate?

The benefits of delegation outweigh the potential drawbacks, yet many managers are hesitant to delegate in spite of the fact that most tasks can be delegated. Managers typically list the following excuses for not delegating.

Instructions:

1. Watch the video and place a check by the reasons given for not delegating.
2. From the class discussion, list responses for each reason to explain why delegation is helpful.

| Video | Reasons | Responses |
|-------|--|-----------|
| | Insufficient time | |
| | The perception the job is too important to take risks | |
| | The manager's belief that he or she can do the job best | |
| | The manager enjoys doing certain jobs | |
| | A lack of confidence in subordinates | |
| | The desire to maintain control | |
| | Fear that a subordinate might do a better job | |
| | Concern the manager's boss will think the manager is not working | |

Notes:

Which tasks are ideal to delegate?

Ideally, you should delegate almost everything except strategic work and those things that only you can do. Delegate a task that:

- Does not require your unique knowledge, skills, and authority
- Is a skillset you don't have
- Occurs on a regular basis
- Many people would be able to perform in case of absences
- Would be acceptable with a less than perfect outcome

Which tasks should not be delegated?

There are some tasks that should never be delegated. They are:

- Is needed once and would take a long time to train
- Has been delegated to you by someone else
- Relates to personnel (hiring, performance reviews, etc.)

Notes:

What are key components of communication?

- Be clear and provide complete information
- Obtain feedback and actively listen
- Ensure understanding on both sides

How is communication used throughout the delegation process?

| Phase | Purpose | Notes |
|-----------|---------|-------|
| Prior | Assess | |
| Beginning | Present | |
| During | Coach | |
| End | Debrief | |

Think of a time something was delegated to you and it did not go well.

- What did you think and feel about that time?

Communication

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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?

- What role did communication play in that situation?

Eight Steps of Delegation: Overview

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Delegation, like several manager competencies, can be learned. It is a process and if you learn to follow the steps in the process and outline the answers in advance, many of the reasons for your reluctance will disappear.

| Step | Description | Purpose |
|---------------|---|--|
| 1. DIRECTIONS | Explain carefully the task or assignment you want undertaken. | Unless you can visualize and articulate what you want, in terms of results, the process will fail. |
| 2. RATIONALE | Provide reasons for the assignment. Explain how it fits into the overall picture of what you are trying to achieve. Also, explain why you selected the employee for the task. | This helps in obtaining buy-in from the employee. It will help them understand their role in the big picture and in relation to other members of the team. |
| 3. OUTCOMES | Describe the specific outcomes and results you expect. Are there any absolute constraints or requirements? | This will ensure you let go and accept there are different ways of achieving a particular task. Completed work should be evaluated against the results you wanted to achieve, not against the way in which you would have achieved them. |
| 4. AUTHORITY | Define the range of decision making and responsibility. There are several levels of authority or freedom you can assign along with the task. Explaining their authority will enable them to know what kind of decisions | This step helps in empowering the employee to accomplish the task.. Delegation should never be revoked. Doing so undermines what you wish to establish: initiative and trust |
| 5. DEADLINE | Agree on when the assignment will be complete. | Clear date to accomplish the task. It may help the employee to know how to prioritize the task with other responsibilities. |

Eight Steps of Delegation: Overview

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| Step | Description | Purpose |
|-----------------------------------|---|--|
| 6. FEEDBACK | Ask for their understanding of the job. | This step ensures that both you and the employee have the same idea of what the end product will look like. This prevents a lot of wasted effort if there is a misunderstanding. |
| 7. CONTROL & FOLLOW-UP | Provide a schedule of milepost meetings for review, process, and progress. | This will help ensure you except only finished work and also ensure effective coaching during the process. You should never accept unfinished or unsatisfactory work. Such acceptance communicates a tolerance of low standards. |
| 8. SUPPORT, RECOGNITION & REWARDS | Indicate there is backup and moral support. A satisfactory outcome should be recognized | Many attempts at delegation fail because hard work goes unappreciated and forgotten. At the very least, a successfully completed task should be rewarded with the chance to be given another challenging task at a future date. |

➤ Which of the 8 steps do you find especially helpful?

➤ Which of the 8 steps do you disagree with or would find hard to follow? Why?

Five Levels of Authority

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| Level | Assignment | Reason |
|-------|--|---|
| 1 | Find out and Tell me. Look into the situation. Get all the facts and report them to me. I'll decide what to do.   | <ul style="list-style-type: none"> Employee <ul style="list-style-type: none"> ➤ New to job ➤ Not ready for more freedom Supervisor <ul style="list-style-type: none"> ➤ Retain control of outcome |
| 2 | Find out, think it out and tell me. Identify the problem. Determine alternative solutions and the benefits and drawbacks of each. Recommend one for my approval    | <ul style="list-style-type: none"> Employee <ul style="list-style-type: none"> ➤ Being developed Supervisor <ul style="list-style-type: none"> ➤ See how employee approaches problems ➤ Confidence in the employee ➤ Approve before action ➤ Chooses and implements the best option. Other Factors <ul style="list-style-type: none"> ➤ Constraints from higher management ➤ Need to communicate the action to others beforehand |
| 3 | Find out, think it out, tell me and do it. Examine the issues. Let me know what you intend to do, then do it.     | <ul style="list-style-type: none"> Supervisor <ul style="list-style-type: none"> ➤ Respect for the employee's ability and judgment ➤ Final check before action is taken |
| 4 | Find out, think about it, do it, then tell me. Take action on this matter, and let me know what you did.     | <ul style="list-style-type: none"> Supervisor <ul style="list-style-type: none"> ➤ Full confidence in the employee ➤ No need to be consulted before action is taken ➤ Wants to know the outcome |
| 5 | Take action. Contact me if necessary.   | <ul style="list-style-type: none"> Employee <ul style="list-style-type: none"> ➤ Full authority to act ➤ Does not need to report results back to supervisor Supervisor <ul style="list-style-type: none"> ➤ Total confidence in the employee |

Five Levels of Authority

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Source: Additional material has been adapted into this chart from an article published by SHRM referencing the book by P. M. Vessenes “Delegation of Authority” in the Journal of Financial Planning.

As you go through the steps of delegation process, be sure to perform the actions in the checklist.

You may want to take notes about additional actions discussed during the step.

| Step | Action | Notes |
|--------------|--|-------|
| 1.DIRECTIONS | <input type="checkbox"/> Explain carefully the task or assignment. | |
| 2. RATIONALE | <input type="checkbox"/> Provide reasons for the assignment. <input type="checkbox"/> Explain how it fits into the overall picture of what you are trying to achieve. <input type="checkbox"/> Explain why you chose them for this assignment. <input type="checkbox"/> Explain how their participation will benefit them | |
| 3. OUTCOMES | <input type="checkbox"/> Describe the specific outcomes and results you expect. <input type="checkbox"/> Explain which parts of the project have constraints or requirements. <input type="checkbox"/> Explain the parts of the project where creativity is permitted | |

Eight Steps of Delegation: Checklist

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| 4. AUTHORITY | <input type="checkbox"/> Level of Authority 1 2 3 4 5 <input type="checkbox"/> Define types of decisions that can be made <input type="checkbox"/> Define access (systems, people) | |
|------------------------|---|-------|
| Step | Action | Notes |
| 5. DEADLINE | <input type="checkbox"/> Set a date for completion <input type="checkbox"/> Discuss priority of task with other responsibilities | |
| 6. FEEDBACK | <input type="checkbox"/> Ask for their understanding of the job: <ul style="list-style-type: none"> <input type="checkbox"/> What is your understanding of the task? <input type="checkbox"/> What will the deliverable look like? <input type="checkbox"/> What are the first three things you will do to start working on this task? <input type="checkbox"/> Clarify, as needed | |
| 7. CONTROL & FOLLOW-UP | <input type="checkbox"/> Provide a schedule of milepost meetings for review, process, and progress (Closer at beginning to ensure right track) <input type="checkbox"/> Use written documentation system. <input type="checkbox"/> Ensure both agree when a deliverable is finished. | |

Eight Steps of Delegation: Checklist

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| | | |
|---|---|--|
| 8. SUPPORT, RECOGNITION & REWARDS | <ul style="list-style-type: none"><input type="checkbox"/> Indicate there is backup and moral support.<input type="checkbox"/> Discuss what you consider urgent and how to contact you at those times.<input type="checkbox"/> Show appreciation during the process.<input type="checkbox"/> Match end of project rewards and recognition to project | |
|---|---|--|

**Source: Three questions to clarify tasks are based on Dana Brownlee's presentation, Leadership Training - Delegation: <https://www.youtube.com/watch?v=ViKZxq6r1zc>.*

Exercise: Case Study – It Was Really So Simple

Brenda Galway leaned back in her chair, sighed heavily and slowly rubbed her eyes, “I don’t need all this aggravation,” she thought to herself. She had just finished reviewing the report she had requested from her new employee, Bill Stanley. The entire report was incorrect and would have to be redone.

Brenda supervised Unit B of the Finance Department. The Unit B team had earned the reputation for successfully handling unusual, special accounting assignments that cropped up. Unit B also had ongoing accounting duties over certain operations departments within the company. The five accounting specialists in Unit B had to complete certain reports every month on those units. Normally, this workload was manageable enough. Unfortunately, this was not one of those times.

About three weeks ago, Brenda’s manager, John Rockland, gave her a major project to complete in three weeks. The “rush priority” nature of the project stemmed from a decision by the company’s Executive Management Committee to install a new accounting procedure and program. In large part, this meant adapting to an automated information system. Currently, most of the information they need and use is being collected and processed manually. In effect, the new system required the accountants to switch from being high-priced clerks to being information system managers. The accountants would be able to examine, “test”, and display

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information more quickly, easily, and clearly – at least, that was the thinking of Executive Management when it authorized the new procedures. Brenda’s assignment was to complete an implementation plan for this new system in three weeks.

When John gave Brenda the assignment, he told her: “Look Brenda, I know it’s short notice and that you’ve got those operations reports due out soon, but you need to get your staff working on this project now. You know I’ll do whatever I can to help.

John had paused a minute, leaning against the doorway, “Why not let that new guy, what’s his name...Bill Stanley? Let Bill Stanley start working on it.”

Brenda could see no alternative. “I guess you’re right,” she said. “I’ll get him on it today.”

John was referring to the new employee Brenda hired last month. Bill Stanley graduated two years ago with a degree in accounting and had worked as a junior accountant at a competitor since then. During the interview process, Brenda told him that he would have to be a self-starter and she expected him to pick up, fairly quickly, on the work.

She now thought back to her words during the interview: “Look, we’re very busy here and we get the plum assignments. I can’t babysit you. I’ll show you your desk and introduce you to the team members. You’re going to have to take care of yourself. Of course, I’m here to help and my door is always open. But you’ll have to pin me down and get me when you need my help. After that, you’re on your own.” Brenda had prided herself on her direct, no-nonsense, up-front communication style.

Bill Stanley seemed to agree with her philosophy. He replied: “Sure, that’s great. I like to work on my own anyways.”

In fact, Bill Stanley had not been Brenda’s first choice for the open position in her department. She was looking for someone who had both accounting and computer experience in addition to a strong background in accounting. Unfortunately, she was unable to pay the salary the few

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applicants with that background wanted. Bill Stanley was the best remaining choice, even though he had very limited accounting and computer experience.

Bill had accepted the job and had been doing well as could be expected. During his first week on the job, he was placed on an existing accounting project and managed to perform effectively according to the project leader. He seemed to get along well with the other team members and was fairly eager to work on the project, although Brenda seldom saw him stay after quitting time.

Brenda had called Bill into her office shortly after receiving the new assignment from her boss. She told him about the project and gave him the deadline. She repeated that her door was always open if he needed help. Bill seemed honored that she had selected him. He tried to ask for some details about the kind of plans he needed to work out. Brenda repeated that it was a simple project plan. After Bill's third question along these lines, Brenda said with a little irritation in her voice, "Look you can figure this out. Unless you've any other big questions, I've got to get ready for a meeting."

Bill answered that he had no other questions.

Brenda had drawn the meeting to a close with the remark: "Keep in touch."

In the two weeks that followed, Brenda continued to be as busy as usual. She occasionally saw Bill in the office. While passing through, she would sometimes stop, put her head through the door, and ask how things were coming. Bill would always say, "Fine."

On two occasions, Bill asked to see her. In the first meeting, about two days later after receiving the assignment, he tried to get her to explain what exactly she was looking for in the report. He produced a detailed outline. Brenda looked it over with and made a broad, vague response. She felt irritated that, in her view, she had to tell Bill exactly what to do and her irritation was apparent. In the second meeting, he asked for some general guidance and help on many of the specifics of the project. She wondered, at one point, why he didn't look up the answers to some

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of these questions himself. She had to cut their meeting short in order to attend another meeting. After the second meeting, she had no further contact with Bill.

It was now three weeks since she gave Bill the assignment. The deadline had arrived, and Bill had submitted the report on time, dropping it off on her desk at 5 o'clock, on his way home. Looking it over, she had easily seen that it was incorrect. Oh, it was all there all right; it was just wrong.

For a long time she continued to rub her eyes, as if doing so would change the contents of the report and it would be correct when she looked at it again.

She thought to herself: "Why didn't he check it out with me to make sure that he was doing it right, especially after he completed this first part? It was really so simple and I took so long to explain it.

Case questions

1. What is the biggest problem?

2. What should she do about the faulty report?

3. Which level of authority was used? 1 2 3 4 5

4. Which level of authority should have been used? 1 2 3 4 5

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5. Why should that level been used?

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Instructions: The situation described in the case study could have been improved – if not completely avoided – through more skillful delegation. Assume that you are the manager in the case study. Using the space below, prepare your notes and comments for an effective delegation “hand off” meeting with Bill.

| Step | What happened? | How can it be improved? |
|---|----------------|-------------------------|
| 1. DIRECTIONS <i>Explain carefully the task or assignment you want undertaken.</i> | | |
| 2. RATIONALE <i>Provide reasons for the assignment.</i> | | |
| 3. OUTCOMES <i>Describe the outcomes and results you expect.</i> | | |
| 4. AUTHORITY <i>Define the range of decision making and responsibility.</i> | | |

Case Study

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| Step | What happened? | How can it be improved? |
|--|----------------|-------------------------|
| 5. DEADLINE <i>Agree on when the assignment will be completed.</i> | | |
| 6. FEEDBACK <i>Ask for their understanding of the job.</i> | | |
| 7. CONTROLS/ FOLLOW UP <i>Provide a schedule of milestone meetings for review, process, and progress.</i> | | |
| 8. SUPPORT, RECOGNITION, & REWARDS <i>Indicate that there is administrative backup and moral support available.</i> | | |

Delegation Resistance

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Even if you're an excellent delegator, your employees may resist the chance to step in. This should not stop you from delegating. You just need to be prepared to combat their objections.

| Employee's Objection | Your Response |
|--|---------------|
| Your employee expresses hesitation and does not seem willing to take on the assignment. You sense that he/she has a fear of being criticized or embarrassed if things don't go as planned. | |
| I'm not sure I have the skills or ability to do this. | |
| I just don't have the time to take on more work. | |
| I'm being taken advantage of. I shouldn't have to do someone else's job or I feel like I am doing your job. What will you be doing? | |
| I've already done my share of extra work without receiving any thanks, reward or recognition. So now I'm hesitant to say "yes." | |
| Are there any other objections that you hear from your employees when you try to delegate? | |

Sources: Adapted from http://lawsoncg.com/lcgi-article_delegate.htm (Lawson Consulting Group). Suggested class discussion responses based on http://managerfoundation.com/blog/how-to-deal-with-delegation-objections#.XPHA_xZKiM9.

Action Plan

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Identify Tasks

Instructions:

1. List all of the tasks that you perform.
2. Categorize each task according to the degree it should be delegated.
3. Select three (3) tasks that will be used to develop an action plan.

| ✓ | Task | Ideal to Delegate | Maybe Delegate | Must Not Delegate |
|---|------|-------------------|----------------|-------------------|
| | | | | |
| | | | | |
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| | | | | |
| | | | | |
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Action Plan 1: Select Person for Task

Instructions:

1. List all of your employees.
2. Then, assess each of them on how well they match the task for each criterion.
3. Place a check mark next to the selected employee

| Task: | | | | | | | |
|--|----------|----------|-----------|---------------|---------------------|-------------------------|---|
| Estimated weekly time commitment: | | | | | | | |
| Ideal skills, experiences, connections: | | | | | | | |
| ✓ | Employee | Has time | Has skill | Is Interested | Already Close to It | Is Capable/ Reliable | Effort to Coach/ Arrange Other Tasks |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |

Action Plan

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Action Plan 1: Plan Delegation Process

| | | |
|--|-----------------------|------------------|
| Delegated to: | Date Assigned: | Due Date: |
| Task/Responsibility Being Delegated: | | |
| Reason for Selected Level of Authority: | | |
| Potential Objections: | | |
| Responses to Objections: | | |

| Step | Action | Notes |
|---------------|--|-------|
| 1. DIRECTIONS | <input type="checkbox"/> Explain carefully the task or assignment. | |
| 2. RATIONALE | <input type="checkbox"/> Provide reasons for the assignment. <input type="checkbox"/> Explain how it fits into the overall picture of what you are trying to achieve. <input type="checkbox"/> Explain why you chose them for this assignment. <input type="checkbox"/> Explain how their participation will benefit them | |
| 3. OUTCOMES | <input type="checkbox"/> Describe the specific outcomes and results you expect. <input type="checkbox"/> Explain which parts of the project have constraints or requirements. <input type="checkbox"/> Explain the parts of the project where creativity is permitted | |

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| Step | Action | Notes |
|-----------------------------------|---|-------|
| 4. AUTHORITY | <input type="checkbox"/> Level of Authority 1 2 3 4 5 <input type="checkbox"/> Define types of decisions that can be made <input type="checkbox"/> Define access (systems, people) | |
| 5. DEADLINE | <input type="checkbox"/> Set a date for completion <input type="checkbox"/> Discuss priority of task with other responsibilities | |
| 6. FEEDBACK | <input type="checkbox"/> Ask for their understanding of the job: <ul style="list-style-type: none"> <input type="checkbox"/> What is your understanding of the task? <input type="checkbox"/> What will the deliverable look like? <input type="checkbox"/> What are the first three things you will do to start working on this task? <input type="checkbox"/> Clarify, as needed | |
| 7. CONTROL & FOLLOW-UP | <input type="checkbox"/> Provide a schedule of milepost meetings for review, process, and progress (Closer at beginning to ensure right track) <input type="checkbox"/> Use written documentation system. <input type="checkbox"/> Ensure both agree when a deliverable is finished. | |
| 8. SUPPORT, RECOGNITION & REWARDS | <input type="checkbox"/> Indicate there is backup and moral support. <input type="checkbox"/> Discuss what you consider urgent and how to contact you at those times. <input type="checkbox"/> Show appreciation during the process. <input type="checkbox"/> Match end of project rewards and recognition to project | |

Action Plan

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Action Plan 2: Next Steps

Task: _____

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Action Plan 3: Next Steps

Task: _____

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

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Action Plan 2: Select Person for Task

Instructions:

4. List all of your employees.
5. Then, assess each of them on how well they match the task for each criterion.
6. Place a check mark next to the selected employee

| Task: | | | | | | | |
|--|----------|----------|-----------|---------------|---------------------|-------------------------|---|
| Estimated weekly time commitment: | | | | | | | |
| Ideal skills, experiences, connections: | | | | | | | |
| ✓ | Employee | Has time | Has skill | Is Interested | Already Close to It | Is Capable/ Reliable | Effort to Coach/ Arrange Other Tasks |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |

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Action Plan 2: Plan Delegation Process

| | | |
|--|-----------------------|------------------|
| Delegated to: | Date Assigned: | Due Date: |
| Task/Responsibility Being Delegated: | | |
| Reason for Selected Level of Authority: | | |
| Potential Objections: | | |
| Responses to Objections: | | |

| Step | Action | Notes |
|---------------|--|-------|
| 1. DIRECTIONS | <input type="checkbox"/> Explain carefully the task or assignment. | |
| 2. RATIONALE | <input type="checkbox"/> Provide reasons for the assignment. <input type="checkbox"/> Explain how it fits into the overall picture of what you are trying to achieve. <input type="checkbox"/> Explain why you chose them for this assignment. <input type="checkbox"/> Explain how their participation will benefit them | |
| 3. OUTCOMES | <input type="checkbox"/> Describe the specific outcomes and results you expect. <input type="checkbox"/> Explain which parts of the project have constraints or requirements. <input type="checkbox"/> Explain the parts of the project where creativity is permitted | |

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| Step | Action | Notes |
|-----------------------------------|---|-------|
| 4. AUTHORITY | <input type="checkbox"/> Level of Authority 1 2 3 4 5 <input type="checkbox"/> Define types of decisions that can be made <input type="checkbox"/> Define access (systems, people) | |
| 5. DEADLINE | <input type="checkbox"/> Set a date for completion <input type="checkbox"/> Discuss priority of task with other responsibilities | |
| 6. FEEDBACK | <input type="checkbox"/> Ask for their understanding of the job: <ul style="list-style-type: none"> <input type="checkbox"/> What is your understanding of the task? <input type="checkbox"/> What will the deliverable look like? <input type="checkbox"/> What are the first three things you will do to start working on this task? <input type="checkbox"/> Clarify, as needed | |
| 7. CONTROL & FOLLOW-UP | <input type="checkbox"/> Provide a schedule of milepost meetings for review, process, and progress (Closer at beginning to ensure right track) <input type="checkbox"/> Use written documentation system. <input type="checkbox"/> Ensure both agree when a deliverable is finished. | |
| 8. SUPPORT, RECOGNITION & REWARDS | <input type="checkbox"/> Indicate there is backup and moral support. <input type="checkbox"/> Discuss what you consider urgent and how to contact you at those times. <input type="checkbox"/> Show appreciation during the process. <input type="checkbox"/> Match end of project rewards and recognition to project | |

Action Plan

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Action Plan 3: Select Person for Task

Instructions:

7. List all of your employees.
8. Then, assess each of them on how well they match the task for each criterion.
9. Place a check mark next to the selected employee

| Task: | | | | | | | |
|--|----------|----------|-----------|---------------|---------------------|-------------------------|---|
| Estimated weekly time commitment: | | | | | | | |
| Ideal skills, experiences, connections: | | | | | | | |
| ✓ | Employee | Has time | Has skill | Is Interested | Already Close to It | Is Capable/ Reliable | Effort to Coach/ Arrange Other Tasks |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |
| | | Y N | Y N | Y N | Y N | Y N | |

Action Plan

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Action Plan 3: Plan Delegation Process

| | | |
|--|-----------------------|------------------|
| Delegated to: | Date Assigned: | Due Date: |
| Task/Responsibility Being Delegated: | | |
| Reason for Selected Level of Authority: | | |
| Potential Objections: | | |
| Responses to Objections: | | |

| Step | Action | Notes |
|---------------|--|-------|
| 1. DIRECTIONS | <input type="checkbox"/> Explain carefully the task or assignment. | |
| 2. RATIONALE | <input type="checkbox"/> Provide reasons for the assignment. <input type="checkbox"/> Explain how it fits into the overall picture of what you are trying to achieve. <input type="checkbox"/> Explain why you chose them for this assignment. <input type="checkbox"/> Explain how their participation will benefit them | |
| 3. OUTCOMES | <input type="checkbox"/> Describe the specific outcomes and results you expect. <input type="checkbox"/> Explain which parts of the project have constraints or requirements. <input type="checkbox"/> Explain the parts of the project where creativity is permitted | |

Action Plan

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| Step | Action | Notes |
|-----------------------------------|---|-------|
| 4. AUTHORITY | <input type="checkbox"/> Level of Authority 1 2 3 4 5 <input type="checkbox"/> Define types of decisions that can be made <input type="checkbox"/> Define access (systems, people) | |
| 5. DEADLINE | <input type="checkbox"/> Set a date for completion <input type="checkbox"/> Discuss priority of task with other responsibilities | |
| 6. FEEDBACK | <input type="checkbox"/> Ask for their understanding of the job: <ul style="list-style-type: none"> <input type="checkbox"/> What is your understanding of the task? <input type="checkbox"/> What will the deliverable look like? <input type="checkbox"/> What are the first three things you will do to start working on this task? <input type="checkbox"/> Clarify, as needed | |
| 7. CONTROL & FOLLOW-UP | <input type="checkbox"/> Provide a schedule of milepost meetings for review, process, and progress (Closer at beginning to ensure right track) <input type="checkbox"/> Use written documentation system. <input type="checkbox"/> Ensure both agree when a deliverable is finished. | |
| 8. SUPPORT, RECOGNITION & REWARDS | <input type="checkbox"/> Indicate there is backup and moral support. <input type="checkbox"/> Discuss what you consider urgent and how to contact you at those times. <input type="checkbox"/> Show appreciation during the process. <input type="checkbox"/> Match end of project rewards and recognition to project | |

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