

# PREVIEW GUIDE



## A Leader's Guide to Delegating



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## TRAINING DESIGN AGENDA

The workshop agenda runs from 3 to 3½ hours, depending on the length of discussion. We encourage you to add or remove activities from the overall plan to meet your specific needs or time constraints.

Workshop Segment	Workbook	Duration (min)
<b>Workshop Introduction</b> <ul style="list-style-type: none"> <li>• Purpose and Objectives</li> <li>• Participant Introductions</li> <li>• Ground Rules and Logistics</li> </ul>	Pages 3	20 minutes
<b>Activity 1: Clearing the Deck</b> <ul style="list-style-type: none"> <li>• Delegation Self-Assessment</li> <li>• Participants share opinions about positive and negative aspects of delegation</li> </ul>	Page 4-5	20 minutes
<b>Activity 2: Video Presentation &amp; Review</b> <ul style="list-style-type: none"> <li>• Video Introduction</li> <li>• <i>Leader's Guide to Delegating</i> Video</li> <li>• Group discussion of video concepts</li> <li>• Delegation is a Two-Way Street</li> <li>• Revisit Delegation Self-Assessment</li> </ul>	Page 6-7	40 minutes
<b>Break</b>		10 minutes
<b>Activity 3: The Delegation Process</b> <ul style="list-style-type: none"> <li>• Step 1: Analyze the Task</li> <li>• Step 2: Select a Delegatee</li> <li>• Step 3: Assign the Task</li> <li>• Step 4: Execute the Task</li> <li>• Step 5: Conduct Regular Feedback Sessions</li> </ul>	Page 8 Page 9 Page 10 Page 12 Page 13	75 minutes
<b>Activity 4: Think Aloud</b> <ul style="list-style-type: none"> <li>• Earlier in the workshop the participants are asked to select a delegation task they are facing in their organization. In this Activity, participants will use that delegation task to role play/think aloud.</li> </ul>	Pages 8-13	20 minutes
<b>Optional Activity: The Team Approach</b> Discuss how you would approach delegating to a team or group instead of a single individual.	Page 14	10 minutes

Workshop Segment	Workbook	Duration (min)
<b>Optional Activity: Peer-to-Peer Delegation</b> Discuss how you would approach delegating when your relationships are peer-to-peer, rather than line authority.	Page 15	10 minutes
<b>Close the Workshop</b> <ul style="list-style-type: none"><li>• Workshop Summary</li><li>• Back at Your Desk</li><li>• Distribute the Reminder Card</li></ul>	Pages 16-17	10 minutes
<b>Total Estimated Time</b>		3 <sup>1</sup> / <sub>4</sub> hours

## **PRESENTATION SCRIPT:** **A LEADER'S GUIDE TO DELEGATING**



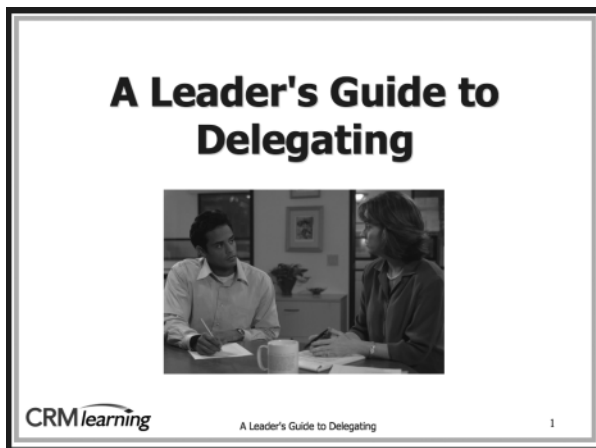
**Note:** This presentation outline will be effective if participants are from the same or different departments or organizations. Participants should be supervisory level and above.

### **WORKSHOP INTRODUCTION**

*Time: 20 minutes*



SLIDE #1: WORKSHOP TITLE



INTRODUCE yourself, welcome the participants, and make a brief comment about how excited you are to discuss such an interesting subject. Using a bit of humor, ask if they were “delegated” to attend the workshop.

SAY

**Most of us will probably agree that our organization succeeds or fails based on people – and our ability to identify, hire, nurture, and promote them.**

**As leaders, we have to trust our employees to complete their assigned tasks, and they need to trust us to recognize their contributions.**

**The key to this two-way relationship is the ability to delegate! Why?**

- **Effective delegation provides opportunities for our employees to learn, grow, and demonstrate their skills. In other words, to become more valuable to the organization.**
- **Ineffective delegation, on the other hand, sets an employee up to fail – and that helps no one.**
- **And, there's a third issue: if you don't delegate, your own work suffers.**

**When you decide to do the routine tasks others could be doing, you won't be doing justice to the more important tasks you were hired for. You'll quickly become overwhelmed and burned out.**

**This workshop will help you establish a clear process for achieving success for everyone involved in delegation: you, your employees, and the organization.**

Ask the participants to take no more than 30 seconds to introduce themselves by sharing their:

- Names.
- Departments or job positions.
- A memory of the last time they delegated an important task. Did they discover a hidden talent or swear never to trust that employee ever again?

When they are done, ask:

- Does delegating make you uncomfortable? If so, how?

## PURPOSE AND OBJECTIVES



### WORKBOOK PAGE 3

Refer the participants to Workbook page 3, which lists the Workshop purpose and objectives. Give the participants a minute to read the Workshop Purpose.



### SLIDE #2: WORKSHOP OBJECTIVES

**Workshop Objectives**

- Recognize the positive impact effective delegation can have on you, your organization, and those you work with.
- Understand the importance of clearly communicating your expectations.
- Learn and practice a 5-step process that enhances your delegation skills and creates opportunities for your employees to succeed.

A Leader's Guide to Delegating 2

SAY

**Let's review the objectives for today's workshop, which are listed on the bottom of page 3 of your Workbook.**

**After completing this workshop, you will:**

- **Recognize the positive impact effective delegation can have on you, your organization, and those you work with.**
- **Understand the importance of clearly communicating your expectations.**
- **Learn and practice a 5-step process to enhance your delegation skills while creating opportunities for your employees to succeed.**

## SELF-ASSESSMENT

Complete the following brief self-check to see how you feel about the skills involved in delegation. No need to share the results – they are for your eyes only.

Using a scale of 1-5, with 5 being **always**, circle the number that best describes you next to each of the statements in the Self-Assessment Checklist.

<b>How I View My Delegation Skills</b>	<b>1 Never</b>	<b>2 Sometimes</b>	<b>3 Neutral</b>	<b>4 Often</b>	<b>5 Always</b>
1. I fully communicate all the facts about each task I delegate.	1	2	3	4	5
2. I know my subordinates' skills, talents, and experience levels.	1	2	3	4	5
3. I am comfortable sharing and assigning authority.	1	2	3	4	5
4. I avoid hovering and allow my delegates to work independently.	1	2	3	4	5
5. I set achievable expectations and provide the resources necessary for the delegatee to succeed.	1	2	3	4	5
6. I encourage my employees to use their initiative when completing a task.	1	2	3	4	5
7. I provide positive feedback on a regular basis.	1	2	3	4	5
8. My delegates receive full recognition for their performance.	1	2	3	4	5

## The Delegation Process

### STEP I: ANALYZE THE TASK

Fill in each section based on a current task in your department.

<b>1. What is the task?</b>
<ul style="list-style-type: none"><li>• Be sure you can be specific about the task, and have all the information you need to help your employee succeed at it.</li><li>• Know why this project needs to get done, and why you want to delegate it.</li><li>• Know any issues that will have to be analyzed or resolved before the task can be delegated.</li></ul>
<b>2. When is it due?</b>
<ul style="list-style-type: none"><li>• Have a specific deadline, and know the consequences of missing it.</li><li>• Know how the task might be affected by outside factors, such as upstream tasks that may fall behind schedule.</li></ul>
<b>3. What resources are available?</b>
<ul style="list-style-type: none"><li>• Know what supporting resources are available – personnel, documents, etc.</li><li>• Be aware of any budgetary constraints on the task.</li></ul>
<b>4. What is the outcome or deliverable?</b>
<ul style="list-style-type: none"><li>• What are you looking for as a result – a report, a presentation?</li><li>• Figure out how you will measure success.</li></ul>



## Background Information

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The *A Leader's Guide to Delegating* workshop is a 3-3½ -hour experience utilizing group discussions, activities and video to help participants practice this important skill. Supplemental materials are provided for post-workshop, "Back at Your Desk" reinforcement of the concepts presented during the workshop.

Anticipated results Include:

- Managers, supervisors and other leaders will gain useful skills in delegating tasks, and gain a better understanding of the impact their delegation skill has on outcomes and their employees.
- Employees will benefit from the enhanced skills of their leaders.
- The organization will benefit from employee skill growth at all levels.

## Materials Included With *A Leader's Guide to Delegating*

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Purchase of the program includes all the materials you'll need to facilitate the program for up to 10 participants. Additional materials are available for larger groups and/or subsequent training sessions.

- The chaptered **DVD** of *A Leader's Guide to Delegating* illustrates the need for effective delegation and a series of steps leaders can take to build their delegation skills. The onscreen host explains the five-step process and introduces the video vignettes of delegation in action.
- A **Facilitator's Guide** provides an introduction to the Workshop and a Presentation Script. Workshop activities and structured discussions help participants explore their own beliefs and tactics around the issue of delegation and develop skills to do it more effectively.
- A **CD-ROM** includes **PowerPoint slides** to support the scripted presentation, as well as a .pdf of the workshop's main tool, the **Delegatee Checklist**.
- **10 Participant Workbooks** contain worksheets for completing the workshop exercises and activities.
- **10 Reminder Cards** provide rapid access to the key points and strategies covered in the workshop.

# For more information...

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