

# THE ART OF DELEGATION

*Responding to Delegation*



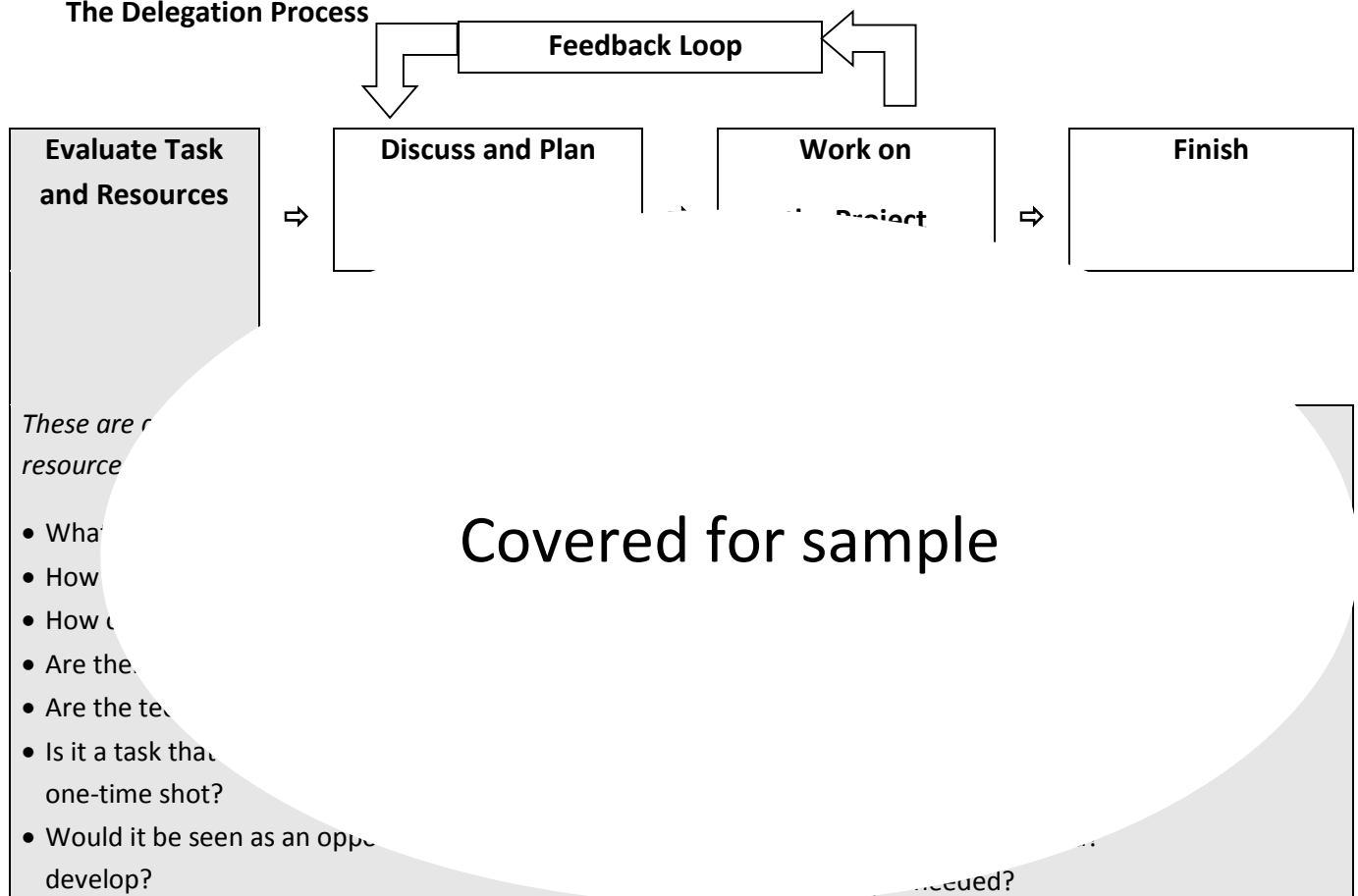
# Definition of Delegation

Delegation – the transfer of an activity while retaining accountability for the outcome.

This could come from:

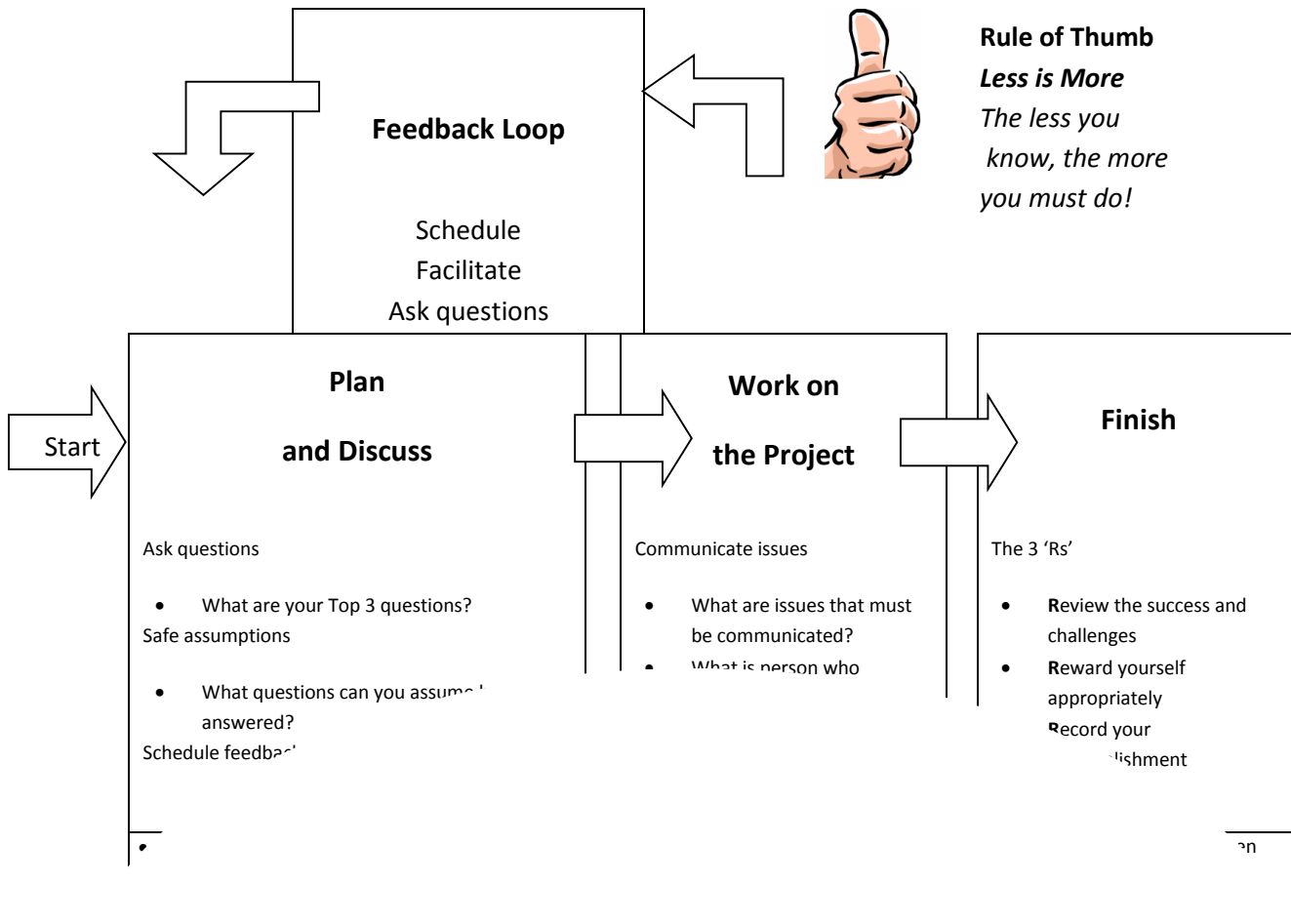
- Your boss
- Other supervisors
- Peers and coworkers
- Anyone who asks you to help out

## The Delegation Process



- Who has the skills now?
- Who has done this task in the past?
- How much coordination is needed?

## Focus on Your Locus



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- Why is it in budget?

- How much flexibility is built into the timeline and budget?
- How often should we meet to check progress? On what dates should we meet?
- What authority do I have?

- Have there been changes to the proposed outcome?
- What concern, issues, or obstacles need to be addressed?
- What lessons have been learned?
- Is the task on track to be completed on time and on budget? Why, why not?
- Do I need help? What kind?

### Responding to Delegation Exercise

Below are 3 delegation scenarios and, on the next page 6 people who are assigning the tasks. You will take one scenario and one person then go through the delegation process:

#### Scenarios

##### **Employee Survey**

Create and conduct an employee survey that will help determine the types of benefits the employees want in the future. This entire project (including implementation and results) needs to be done prior to the Board of Directors meeting in 5 months when HR will make its recommendations. You can ask up to 5 people to help you with this project.

##### **Company Activity**

Develop and plan an activity that all employees can take part in that will be entertaining and business related. The event is intended to make employees feel good about where they work and provide motivation. Total budget of \$30,000.

##### **Client Training Session**

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## Tasks Assigned by

**Sue** Sue, a senior account manager. You've worked with Sue for 5 years and know her from meetings and other projects she's asked you to work on. She is very client-focused with a tendency to look at everything in terms of booking opportunities. She is normally a fast-talker who usually gives you more than you need to know but not necessarily the correct information. Sue almost always answers her phone; when she doesn't, she returns calls promptly. Sue is on the road much of the time so she provides her cell phone number to anyone she works with.

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**Steve** Steve, a co-worker in your office. You often help each other out when needed and Steve has been given permission to ask someone else for help. Steve was assigned to him. Your boss has given you permission to ask Steve for help and get along well. You've noticed how Steve always looks at the same way you look at the

**Ali** Ali, a co-worker in your office. Ali was a

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**B** B, a co-worker in your office. B calls

**Elaine** Elaine, your co-worker. Elaine works with her instructions but trusts you to do the work. Elaine has given you balanced feedback and not made it seem like a discipline. Elaine put a lot of trust in you, you rarely see her during the day (and sometimes only once or twice during the week).

**Dave**

Dave, a supervisor from another office. He called your boss and asked if you could take on this task. Your boss gave him the permission to assign it to you and let you know to expect the call. Dave has a reputation of being very hard to communicate with – you’ve heard that he doesn’t return phone calls or answer e-mails. You’ve also heard he’s very client-focused and will do whatever it takes to satisfy their needs. Additionally, your boss told you that Dave will call and leave messages at strange times as he often forgets he’s in a different time zone.

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**Prepare Yourself for Delegation**

- Identify your goals – what types of professional growth do you want?
- Let your supervisor know your goals
- Identify what skills you have and how they can be used more effectively
- Continuously improve your skills through training and experience
- Follow the process from this training to be more successful in tasks and projects

**Your Assignment**

**Next time someone delegates something to you:**

- **Ask at least 3 questions**
- **Schedule at least one feedback session right away**
- **Use the Delegation Template as a guide throughout the process**
- **Reward and record your results**

Delegation Template

Date assigned

Task

Deadline

Person delegating task

Milestones

1

2

3

Deliverable / final outcome description

Budget

\$

Charge #

Feedback Meetings

Date	Notes
Time	

Date	Notes
Time	

Date	Notes
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Time	
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Feedback, lessons learned, evaluation		Final meeting date:  <input type="checkbox"/> Reward  <input type="checkbox"/> Share success
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### Initial Plan and Discuss Meeting

- ☐ What does the outcome look like?
- ☐ What does the client expect to see when it is done?
- ☐ What is the deadline? What are the milestones?
- ☐ Why is it essential that this be done on time?
- ☐ Who/what is responsible?
- ☐ What are the risks?

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- ☐ What is the purpose of the meeting?



### **Feedback Meetings**

- ☐ Have there been changes to the proposed outcome?
- ☐ What concern, issues, or obstacles need to be addressed?
- ☐ What lessons have been learned?
- ☐ Is the task on track to be completed on time and on budget? Why, why not?
- ☐ Do I need help? What kind?