



**SPURWINK**  
going the distance

# **LEADERSHIP DEVELOPMENT SERIES: SESSION 2**

Effective Management - Delegation

October 24, 2017

Cohort 3

# CURRICULUM OVERVIEW

## Topics

- Sept Session and AIM  
Retreat: Understanding you  
and your team
- TODAY: Delegating  
successfully
- Next AIM Session:  
Coaching up - promoting  
employee growth and  
development

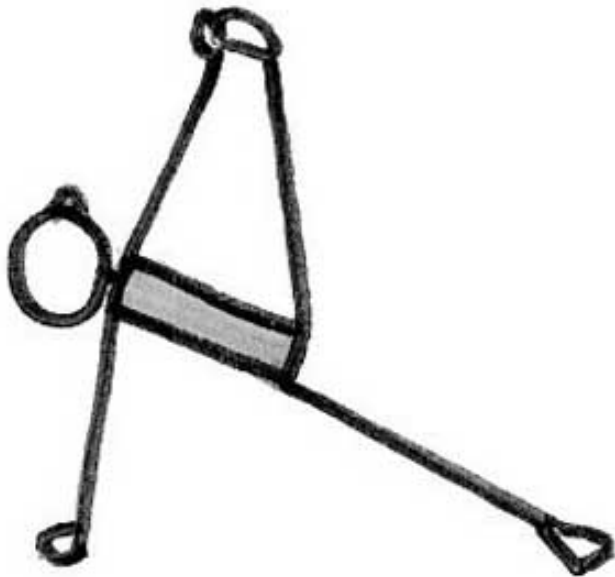
## Structure

- Classroom instruction
- Interactive exercises
- Homework
- Practice, practice,  
practice...



# WARM UP

Choose a coin



- Look at the year on your coin. Take a minute to think about what you were doing when that coin was minted. Were you in school? Were you a child? Where did you work? Were you married? Where did you live? What was going on in your life at the time?
- If you prefer not to discuss your life during the year selected, choose another coin.
- Share with the group as much as you can recall (and are willing to share) about yourself in the year your coin was minted.



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# EFFECTIVE MANAGEMENT

## Tasks

- **Delegate work and roles/responsibilities**
- Hold employees accountable for agreed upon results
- Create motivating environments
- Build cohesive teams
- Coach employees up
- Manage sideways & up

## Goals

- Maximize what each employee has to offer
- While earning their loyalty
- And building their ownership and excitement for the work and results of the company



# DELEGATION CYCLE



# TODAY'S TOPICS

1. Delegating effectively
2. Staying connected to your employees and the work they own
3. Adapting Your Style

Next Session:

4. Giving and receiving feedback / Accountability



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# ACTIVITY

Full group share

When it comes to successfully delegating work and/or responsibilities to employees, what's one thing that you have learned from experience about...

1. What DOES work, and
2. What DOESN'T work?



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# 1. ESTABLISH SHARED EXPECTATIONS

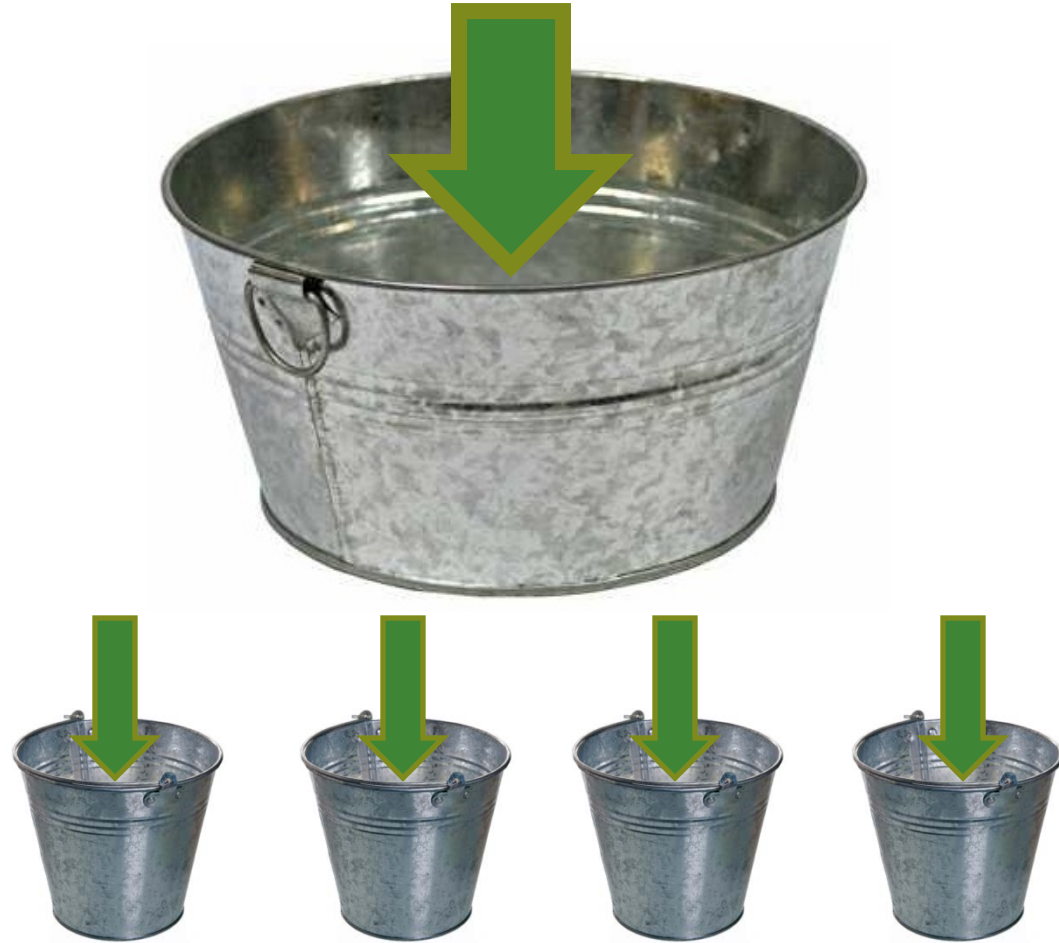


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# OWNERSHIP

Delegating is not the same as asking someone to help you!



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# OWNERSHIP

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# DELEGATION CONVERSATIONS: ESTABLISHING SHARED EXPECTATIONS

7 Pieces of Shared Information to Gain Mutual Agreement On

1. What does success look like?
2. Who should be involved?
3. When is it due?
4. Where can the employee go for resources?
5. Why does the work matter?
6. How should the employee approach the work?
7. Are you really on the same page?



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# 1. SUCCESS

- Sometimes identifying what success will look like is easy.
- When it's not, don't hesitate to ask your employee what he/she thinks a successful outcome will look like.
- Use samples and templates to clarify.
- Don't define success too narrowly.
- Remember to be explicit about what a successful approach to task completion looks like too.



## 2. BY WHEN

- Make sure you establish a due date.
- Make sure your employee knows where the project falls relative to his/her other priorities.
- For large, multi-stage projects, you may want to agree on interim deadlines to assure work is moving forward as it should



### 3. WHY

- Many of us are guilty of skipping this step!
- Explain why the project matters and why you've chosen to give it to the employee.
- It's amazing how often doing so builds excitement and buy-in.
- This step is key to helping employees shift from a compliance mentality to an ownership mentality.



# 4. WHO

## MOCHA

<b>Manager</b>	Assigns responsibility and holds the owner accountable. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if the work is off track.
<b>Owner</b>	Has overall responsibility for the success or failure of the project. Ensures that all the work gets done (directly or with helpers) and that others are involved appropriately. <b>There should be only one owner.</b>
<b>Consulted</b>	Should be asked for input or needs to be brought into the project.
<b>Helper</b>	Available to help do part of the work.
<b>Approver</b>	Signs off on decisions before they're final. May be the manager/supervisor, though might be someone further up the chain.



# 5. RESOURCES

- What is the budget?
- Use MOCHA to clarify the human resources that are available.
- Make clear how you will be available to...
  - Clarify expectations
  - Review progress
  - Help brainstorm solutions
  - Intervene when needed on issues beyond the employee's control





# KEY POINT

Keep the monkey of ownership on the employee's back!



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## 6. HOW – TIPS & EXAMPLES

- Don't leave employees to figure out what you already know from experience.
- What can you show them? What/Who can you point to as a model of success?
- Make sure you mention any constraints on the project or process.



# 7. ALIGNMENT: SAME PAGE?

- Always ask for a repeat-back—either verbally or in writing.
- For large or complex assignments, have the employee write-up a plan that you then review together.



# ACTIVITY: ESTABLISHING SHARED EXPECTATIONS

## Delegation Handout – Front Side #1

- Identify a task or project you need to delegate to one of your employees in the near future. Fill in the handout part #1.
- **Debrief in groups of three:**
  - How hard/easy was it to describe success?
  - What questions might you ask your employee in order to have her/him share in the responsibility of defining success?
  - Are there aspects of delegation that you realize you tend to overlook?
  - What could you focus on to improve your effectiveness when delegating?

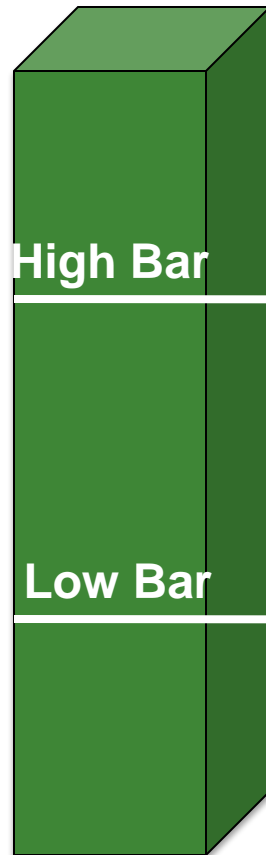


# DEBRIEF: ESTABLISHING SHARED EXPECTATIONS

1. How does the information we just covered fit with what you already know?
2. What does it reinforce for you?
3. What might you do differently moving forward?



# HIGH EXPECTATIONS



**High Bar** = the expectations you collectively agree are critical to being smart and healthy

**This gap = your culture differentiator and the source of most managerial challenges**

**Low bar** = the minimum threshold for acceptable behavior



# KEY POINT

- Expectations are set based on the client's needs, the outcomes you are striving for, and what outstanding services delivery looks like at Spurwink...
- NOT what a good day for the employee looks like.



## 2. STAYING INVOLVED



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# STAYING INVOLVED

## What are you really doing?

- Scanning for gaps
- Looking for opportunities to promote learning and accountability





What does this exchange really mean? What do you really know?



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# STAYING INVOLVED

## Methods

- Check-in directly
- Review aspects of the work before it's done
- See the work being carried out firsthand – observe.  
Best for behavioral tasks/roles.



# CHECK-IN DIRECTLY

- By e-mail, phone, in-person, regular meetings, meetings on specific topics, quick stop-bys, etc.
- Your job is to scan for gaps, not to assume everything is proceeding smoothly
- You need to do this in a way that does not diminish the employee's confidence or take the monkey of ownership from them



# CHECK IN 'UNDER THE HOOD': PROBING FOR GAPS

## Handout: Weekly Check Ins

Can you give me a specific example?

How are you monitoring your success with that?

How did you handle that situation we confronted yesterday?

What seemed to work well? Why do you think it worked?

How will you handle the next complaint?

What could go wrong? What are you most worried about?

What one or two things will make this week a success for you?

What's most important out of all those things?

What makes you say that?

What kind of data do we have about how that's working?

Roughly how much of your time are you spending on that?

What's your timeline for that?

Can we talk through how you're approaching that situation?

What other options did you consider?



# REVIEW ASPECTS OF THE WORK: INTERIM SIGNS

- Drafts, samples, data points
- There may be useful measures (quantitative or qualitative) for you to track together that will indicate progress toward the desired outcome



# SEE THE WORK BEING DONE

- Observe work in action: meetings, phone calls, trainings, customer interactions, etc.
- Staying in touch in this way will likely help you serve as a resource for your employee
- You need to do this in a way that does not diminish the employee's confidence or take the monkey of ownership from them



# ACTIVITIES: STAYING INVOLVED

## I. Delegation Worksheet

- a. Go back to the person you were thinking of completing the first side of the Delegation Worksheet.
- b. Complete Step 2 of the Delegation Worksheet.





# ADAPTING YOUR APPROACH

- Skill and will
- Importance and difficulty
- Everything DiSC™ behavioral style



# HOW HANDS ON?

## Importance & Difficulty

*Is the task hard to do and how well does it need to be done?*

Low

High

High

**Relatively  
Hands-Off**

**Hands-On**

Low

**Hands-On**

**Very  
Hands-On**

## Skill & Will

*Is the task something the employee has done before?  
Something he/she enjoys doing?*



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# SITUATIONAL LEADERSHIP

Directing	Coaching	Supporting	Delegating
When employees require a high level of one-way guidance to complete the task	When employees need more than average guidance but also want to learn, this approach involves more two-way dialogue	When employees have the skills to complete the task but lack the confidence, this approach involves below-average amounts of direction, but a high level of dialogue	When employees know what to do, how to do it, and have a high level of confidence



# ACTIVITIES: STAYING INVOLVED

## I. Delegation Worksheet

- a. Go back to the person you were thinking of completing the first side of the Worksheet.
- b. Complete Step 3, the back side of the Worksheet.



# MEETINGS

- One-on-one check-ins
- Periodic step-backs
- Staff meetings



# ONE-ON-ONE CHECK-INS

Why have them?

- Check in on individual work, projects, responsibilities and scan for gaps
- Assess and recalibrate priorities
- Coordinate work
- Provide feedback
- Connect personally



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# ONE-ON-ONE CHECK-INS

## Frequency

- It depends
  - Minimum twice a month
  - Ideally, once a week
- Just you and the employee
- How long?
  - Maybe 15 minutes if you meet frequently
  - Generally 30 minutes
- Managing people takes time. If you want a strong team of people owning their work, productive, supportive. It takes time.



# ONE-ON-ONE CHECK-INS

How do you prepare?

- Think beforehand about what you want to accomplish at the meeting
- Use an agenda (and ask the employee to contribute to it)
- Keep track of the items you want to raise (stay focused)
- Make sure next steps are clear at the end
- Include a human element (attend to safety issues)



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# PERIODIC STEP-BACKS

- Bigger picture than check-in meetings
- Evaluate progress against annual goals
- Assess learning from recent work and how he will apply what he's learning to future work
- Identify and explore how to meet development needs
- Address retention factors (if appropriate)



# STAFF MEETINGS

- Do *not* use for individual management
  - One-on-one check-in much better suited
- Best suited for communication and coordination issues affecting the whole group
  - *“Let’s talk about how the new procedures will affect intake and client flow...”*
- Good for relationship and trust building
- The length of most staff meetings could be shortened...because you’re not doing individual management



# MANAGING STAFF REMOTELY

- Establish a clear system for communicating with one another and stick to it
- Create ways for remote staff to stay connected
- Design opportunities for in-person interaction
- Find ways to observe remote staff in action



# MANAGING WORK YOU KNOW LITTLE ABOUT

- Establish shared goals and clear deadlines
- Scan for gaps by asking good questions
- Use your ignorance to your advantage
- Connect the employee to her clients and co-workers
- Trust your intuition and evaluate based on what you do know



# ACTIVITIES: STAYING INVOLVED

- a. Think about the people on your primary team.
- b. [REDACTED] add to your managerial "tool kit" to  
connected with everyone and
- c. [REDACTED] ke to implement this strategy for
- d. [REDACTED] n and compare notes.



# BREAK



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# 3. ADAPT YOUR APPROACH



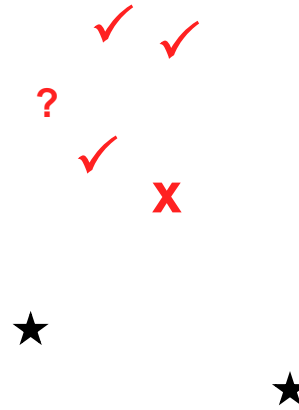
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# ADAPTING YOUR APPROACH WHEN DIRECTING & DELEGATING

***Your Style***

***Profile, Page 7***

★ One strength  
and one  
challenge



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# DIRECTING & DELEGATING TO DISC<sup>®</sup>

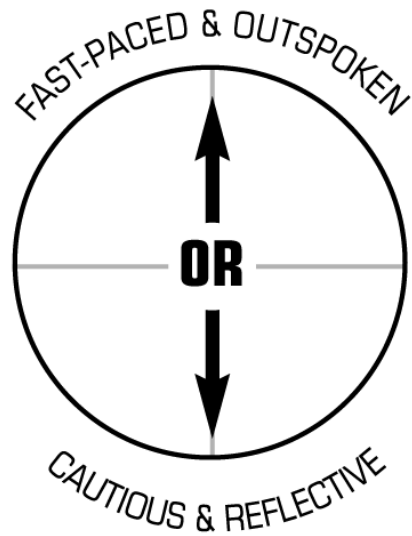
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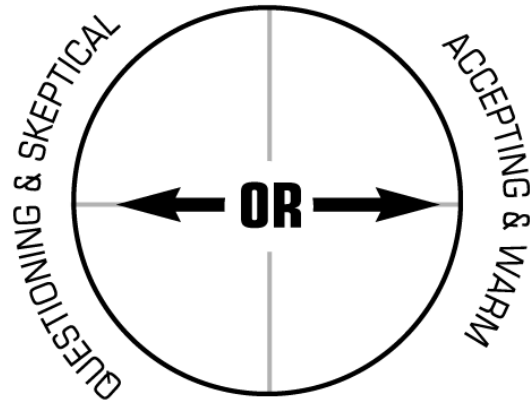
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# REMINDER: PEOPLE READ YOUR TEAM

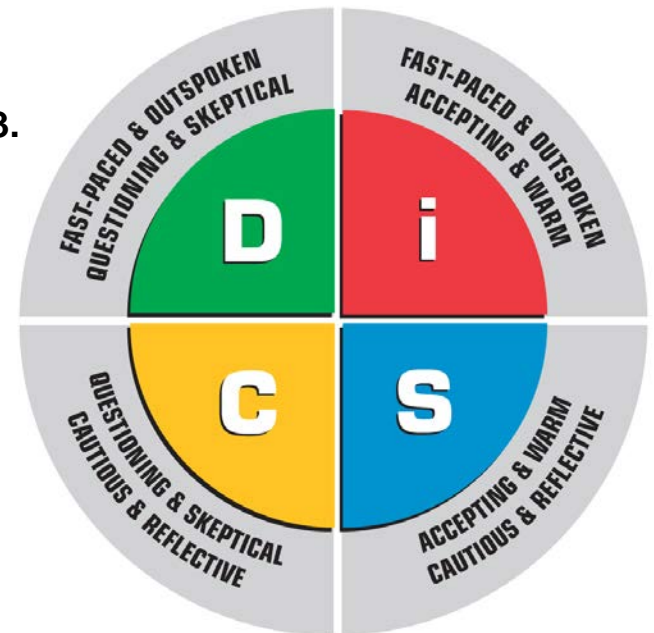
1.



2.

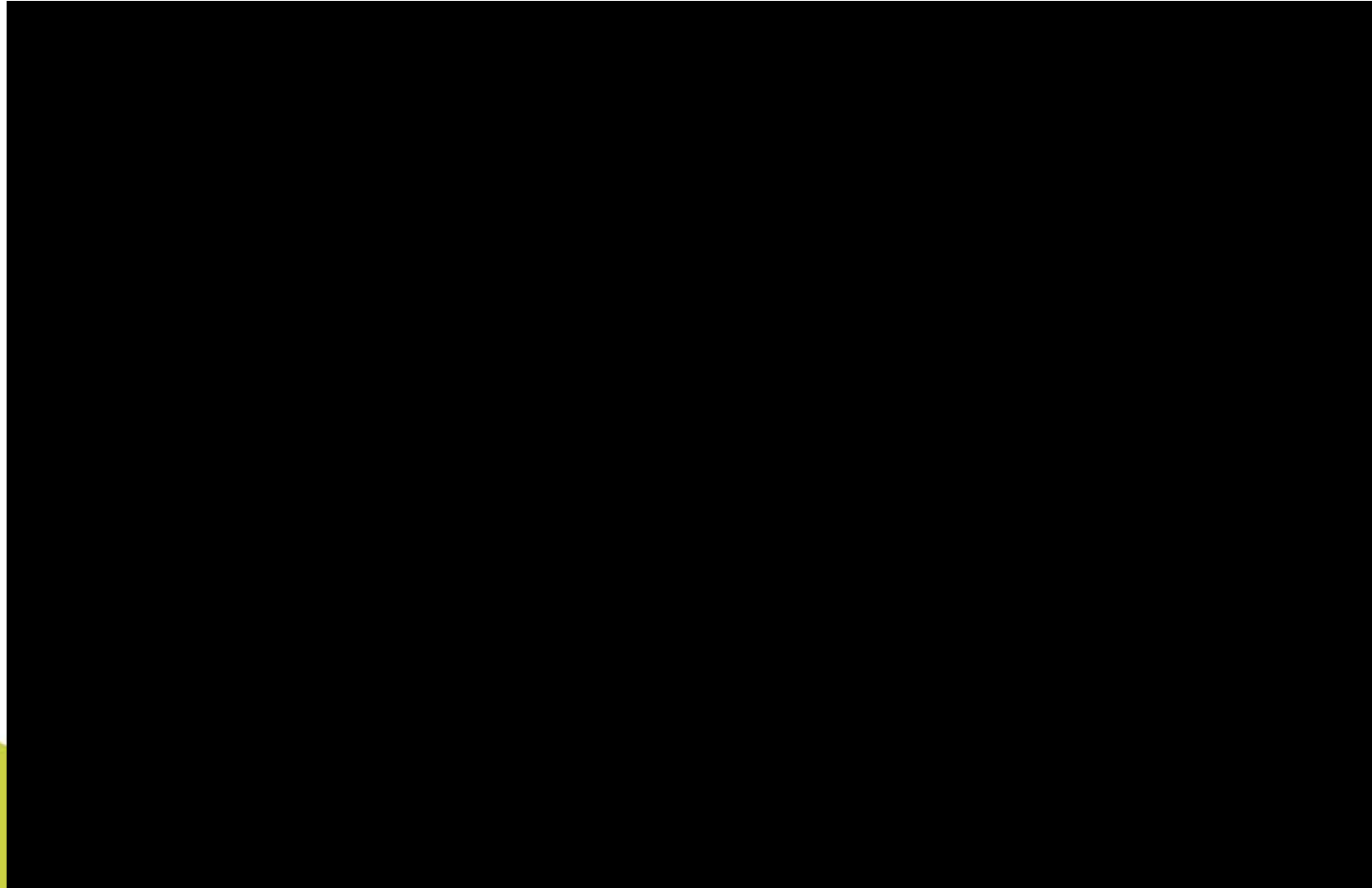


3.



# DELEGATING TO 'D'

Handout for Notes



# DELEGATING TO 'D'

## *Handout*

- What did **Charles** do that was **ineffective**?
- What did you **observe** about **Carlos**?



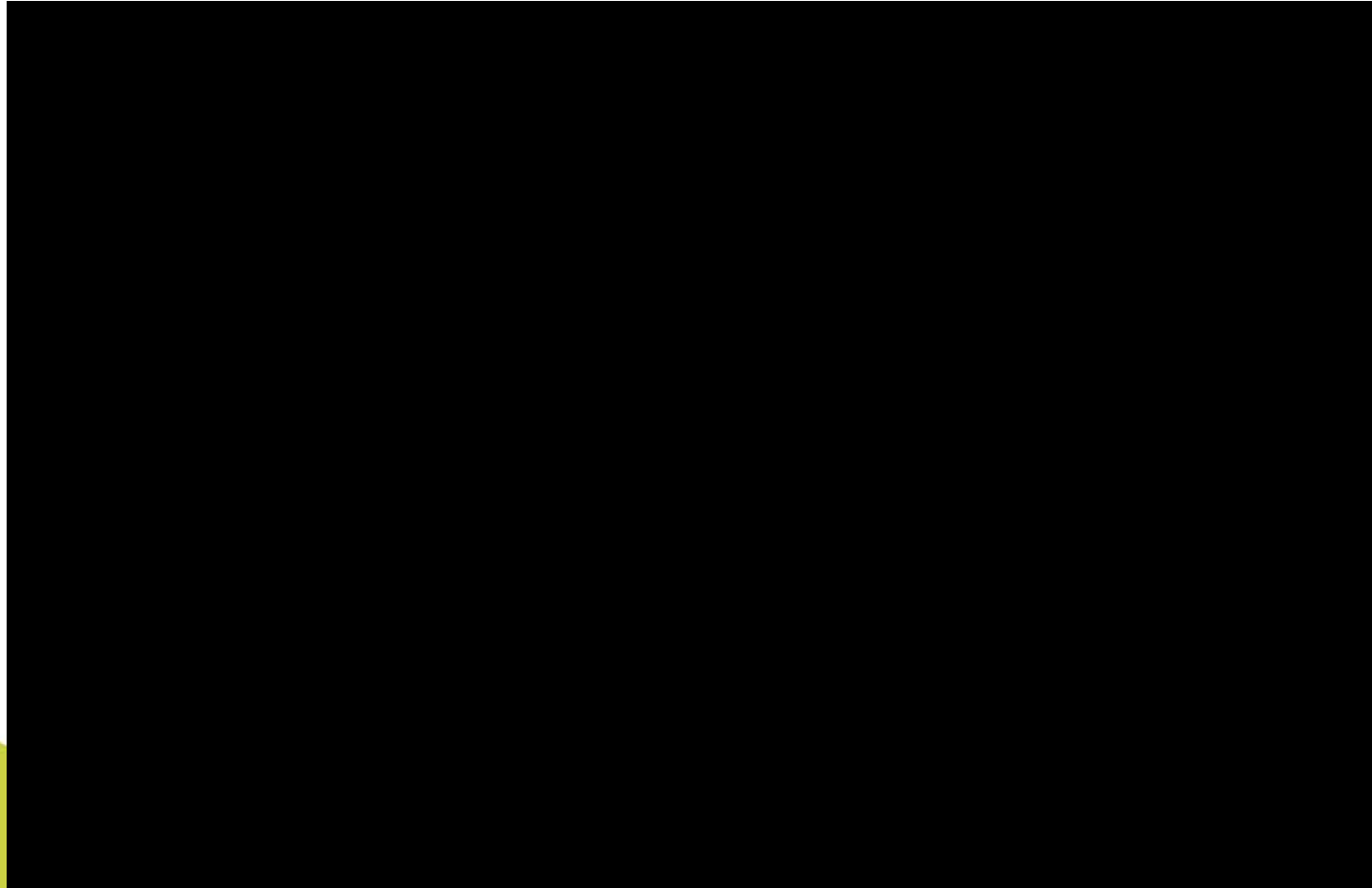
**Charles**  
**Manager**



**Carlos**  
**"D" Employee**



# ADAPTING TO 'D'



# ADAPTING TO 'D'

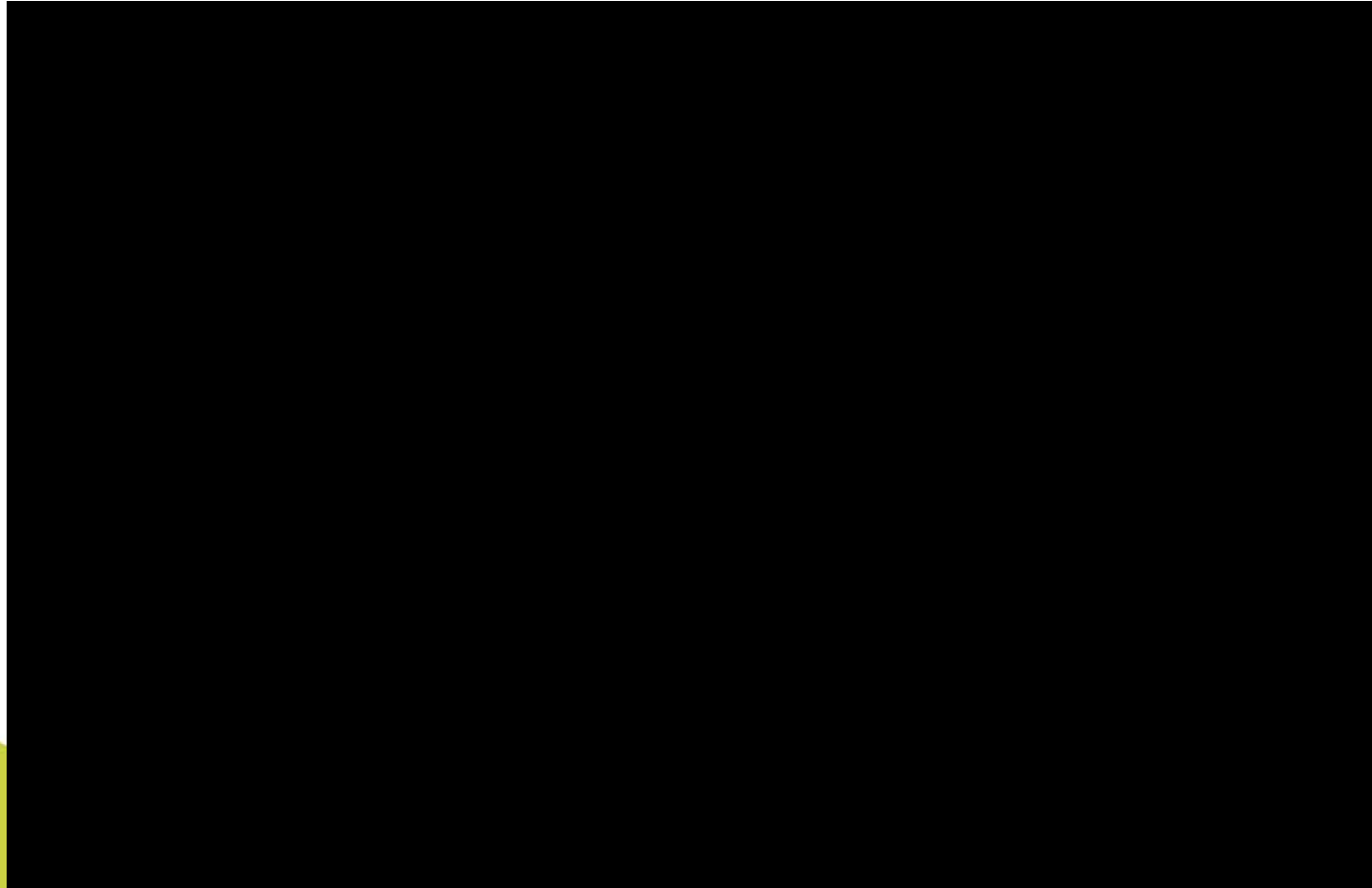
What did  
Charles do  
**differently?**



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# DELEGATING TO 'i'

Handout for Notes



# DELEGATING TO 'i'

What did **Charles** do that was **ineffective**?

What did you **observe** about **Anna**?

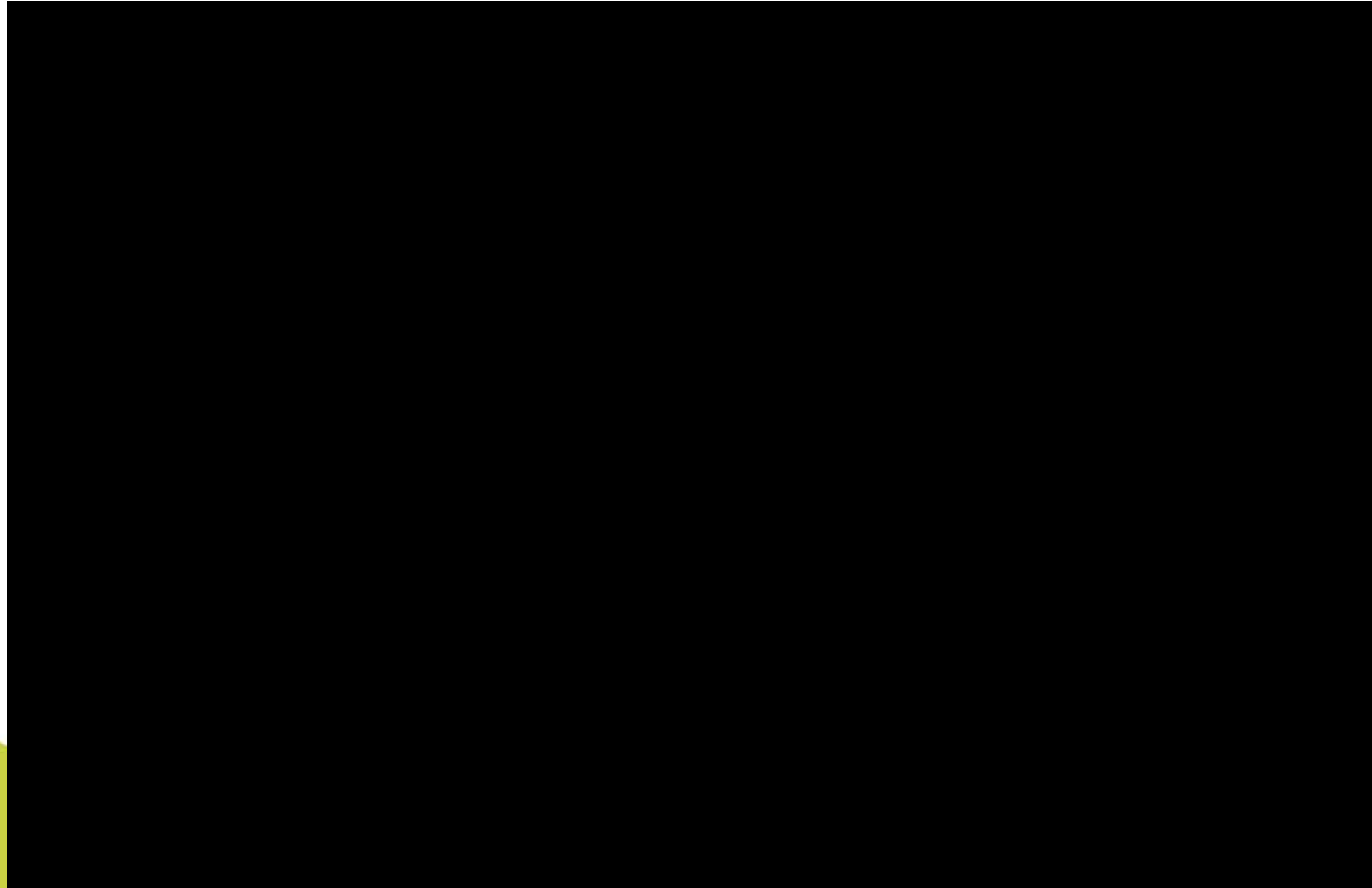
**Anna**  
**'i'** Employee



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# ADAPTING TO 'i'



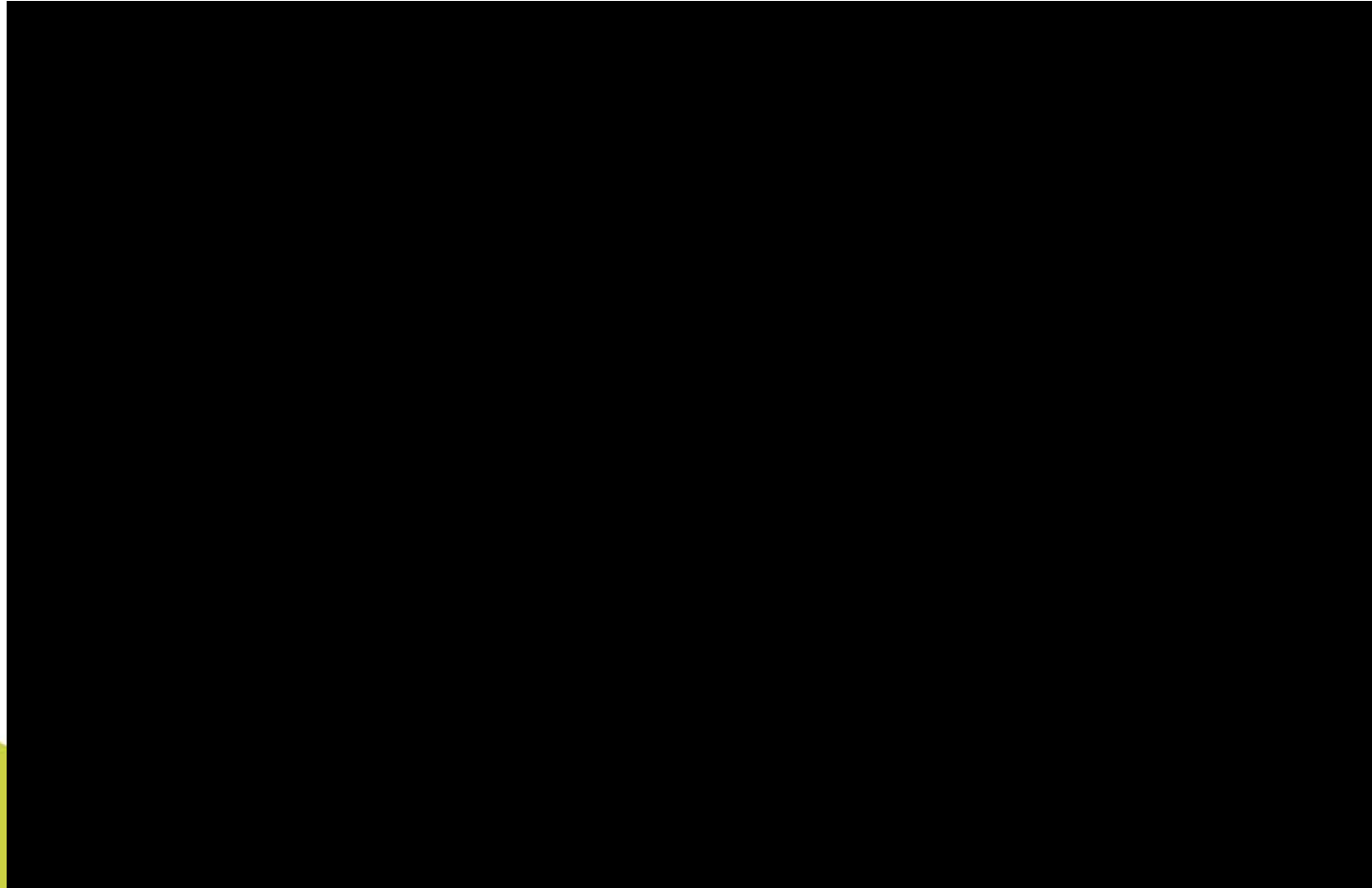
# ADAPTING TO 'i'

What did  
Charles do  
**differently?**



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# DELEGATING TO 'S'



# DELEGATING TO 'S'

What did **Charles** do that was **ineffective**?

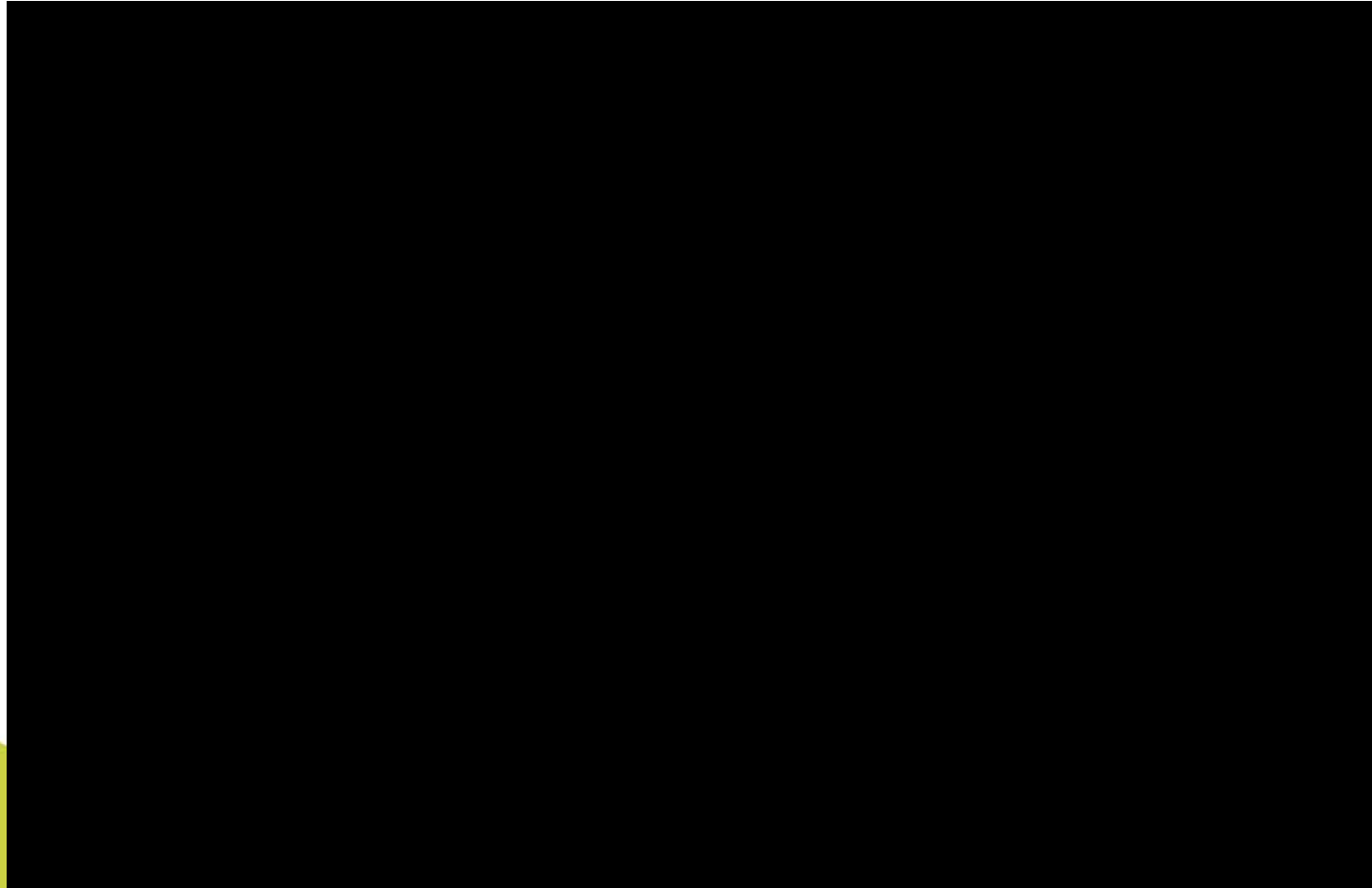
What did you **observe** about **Christiana**?

**Christiana**  
**"S" Employee**



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# ADAPTING TO 'S'



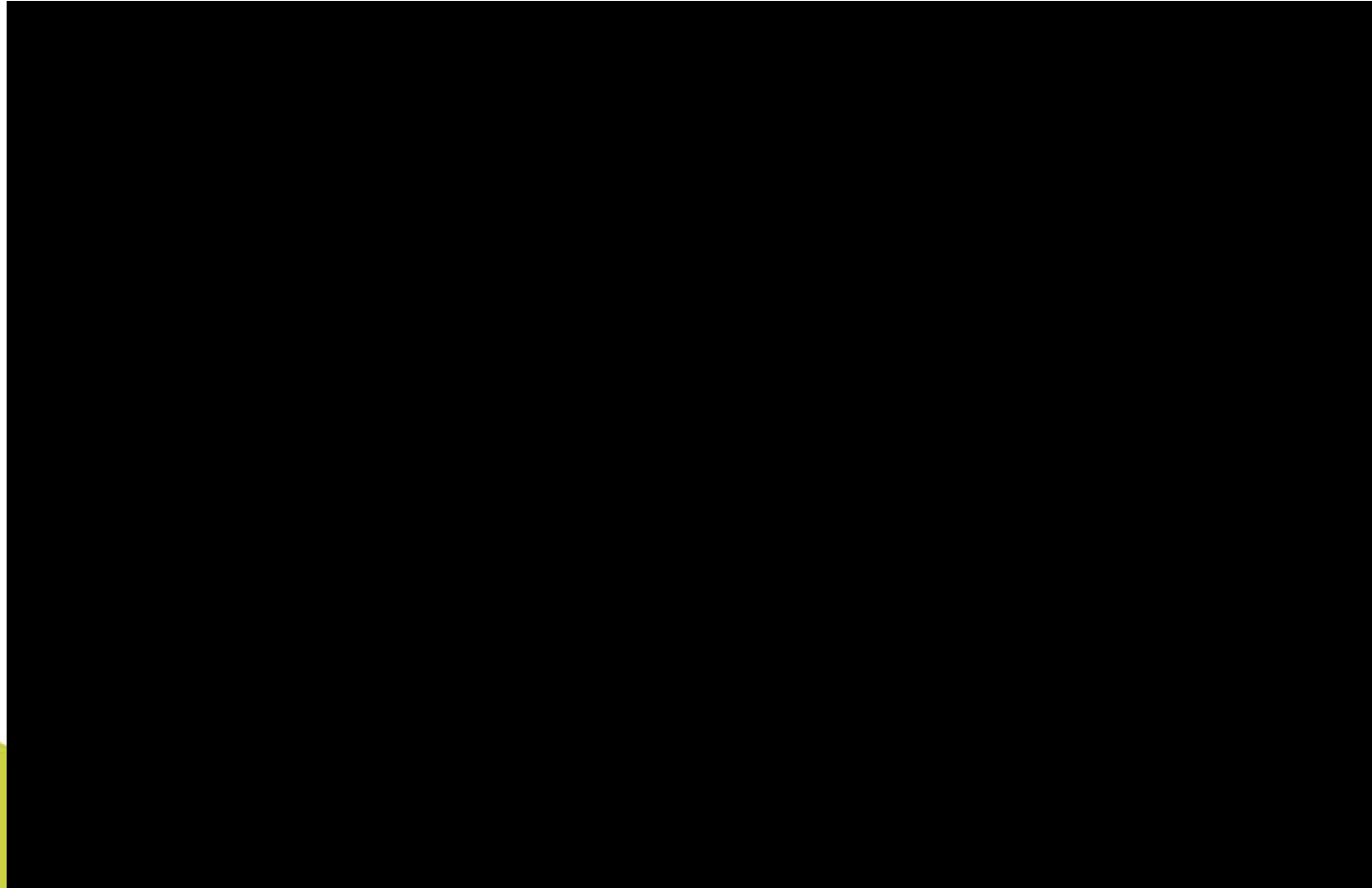
# ADAPTING TO 'S'

What did  
Charles do  
**differently?**



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# DELEGATING TO 'C'



# DELEGATING TO 'C'

What did **Charles** do that was **ineffective**?

What did you **observe** about **Michael**?

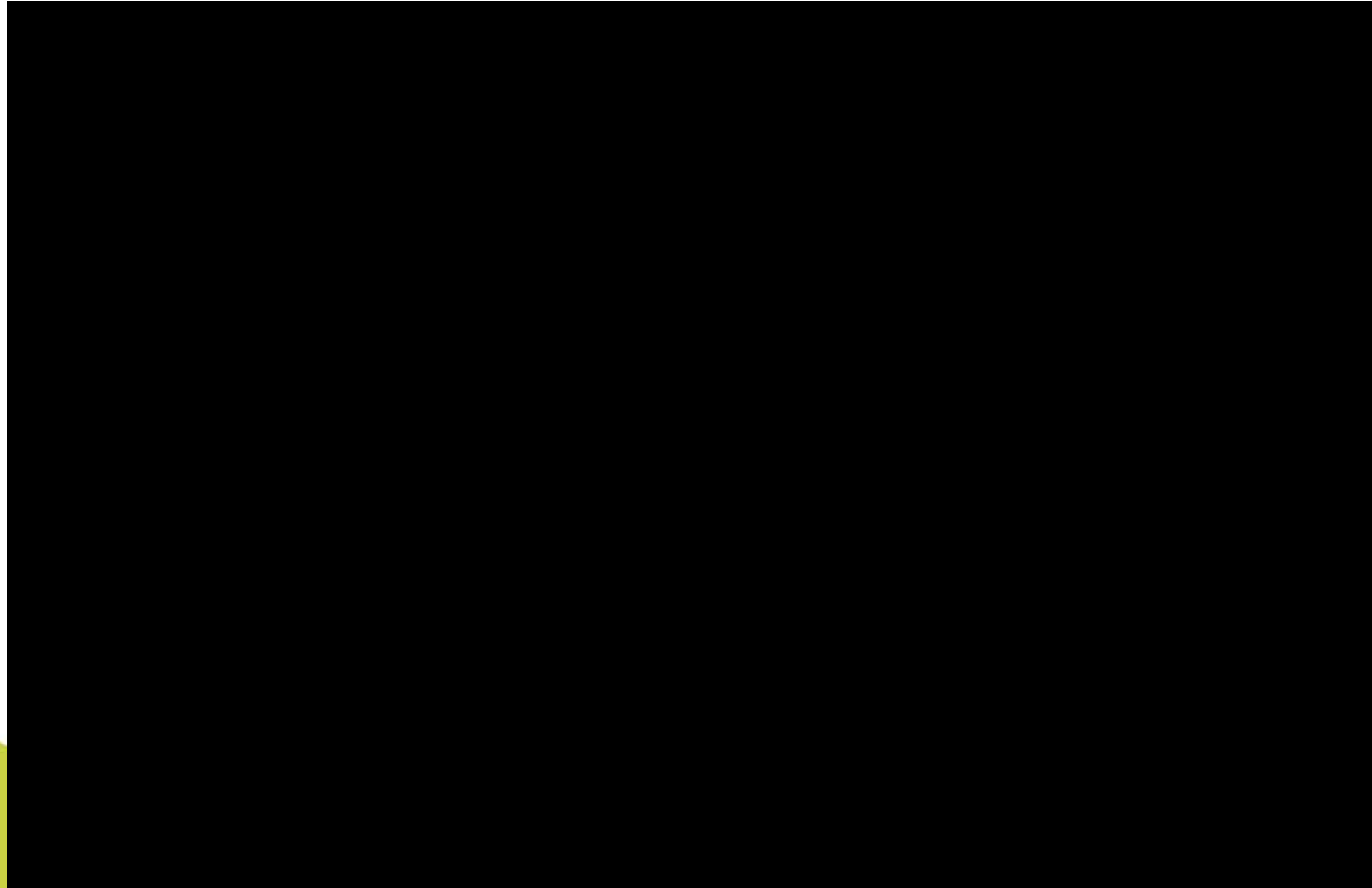
**Michael**  
"C" Employee



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# ADAPTING TO 'C'



# ADAPTING TO 'C'

What did  
Charles do  
**differently?**



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# ACTIVITY I: ADAPT YOUR DiSC™ APPROACH

## Everything DiSC™ Directing & Delegating Action Plan

- Reflect on someone you have experienced as challenging to delegate to.
- Use the people-reading technique to identify his/her DiSC style.
- Turn to the relevant page in your DiSC profile to read about how you might adapt your style to meet his/her needs better.
- Complete the worksheet Directing & Delegating Action Plan



# ACTIVITY II: ADAPT YOUR APPROACH

## Delegation Worksheet

- Return to the task or project you hope to delegate successfully in the near future.
- Use the **Delegation Handout** (back side) to reflect on #3b:
  - How might you need to flex your behavioral style?
- **In small groups, debrief what you will do with one another.**



# 4. FOLLOW UP TO PROMOTE LEARNING AND ACCOUNTABILITY



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# NEXT COHORT 3 SESSION: DEC. 19

- GIVING AND RECEIVING FEEDBACK
- ACCOUNTABILITY



# DEBRIEF

- Jot down one new idea from this morning that really resonated with you and post it on the wall.



# HOMework

It all comes down to practicing.

- Use and prepare the Delegation Worksheet and be disciplined in changing your behavior.
- Cluster with the members of your Peer Learning Team.
- Share the specific actions you identified for improving your delegation effectiveness.
- Has everyone created a MyEverythingDiSC.com account? Agree on steps for completing this task.



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THANK YOU

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