

**DELEGATING
SMARTLY**



Purpose

To help you use delegation as a powerful tool for achieving results and developing team members.

Learning Goals

By the end of this session, you will be able to:

- Identify your delegation strengths and target areas for improvement
- Choose the right work and the right person to delegate it to
- Use a model for successful delegation



DELEGATION ASSESSMENT



Based on your experience with delegation, for each statement, mark the response that best represents what you do. Each statement begins with the phrase “When I delegate, I strive to....”

When I delegate, I strive to:	Rarely	Sometimes	Often	Always
1. Consider the development needs of my staff.	1	2	3	4
2. Plan in advance what I will communicate when I delegate the assignment.	1	2	3	4
3. Get the team member’s input on the proposed assignment.	1	2	3	4
4. Make sure that I am providing the appropriate amount of authority.	1	2	3	4
5. Take into consideration the experience level and capabilities of the person I’m delegating to.	1	2	3	4
6. Use a systematic explanation process to ensure that the assignment is clear and understood.	1	2	3	4
7. Delegate assignments that cause people to stretch their abilities.	1	2	3	4
8. Make myself available to assist and provide support when necessary.	1	2	3	4
9. Allow people to use their own style and methods in getting the work done.	1	2	3	4
10. Coach people when they stumble rather than take back the assignment.	1	2	3	4
11. Refuse to have work delegated back to me.	1	2	3	4
12. Keep track of progress and intervene only when absolutely necessary.	1	2	3	4

Tally up the total number of points. Your score: _____

Based on this assessment, what are 2 areas of delegation that you would like to strengthen?



DELEGATION DEFINED

Sharing authority and work with others in order to accomplish organizational goals and to help people grow.

DELEGATION IS... IS NOT...

Delegation is:

- Sharing work
- Sharing authority
- Developing others

Delegation is not:

- Abdicating all responsibility
- Assigning work and forgetting about it
- Dumping undesirable tasks

BENEFITS OF DELEGATION

List the benefits of delegation to:

Your Eye Care Center	You as the Leader	Your Team Members

Why leaders don't delegate:

DELEGATION AND THE LIFECYCLE OF INDIVIDUAL DEVELOPMENT



Your team members probably have varying levels of experience and are at differing levels of performance. What and how to delegate to each person will vary with where the team member is in relationship to the life cycle of his or her development.



4. High Performance

“I welcome tasks that challenge me and push my skills to the highest level.”

3. Independent Performance

“I can do the job you want, and I’ll report back as I make progress.”

2. Performance With Support

“I welcome this new assignment, but I’ll need to come to you from time to time for feedback and guidance.”

1. Expectations and Training

“I’m willing to try, but I’ll need to know what to do and will want your close support.”

DECIDING WHAT TO DELEGATE



It's important to analyze your job in order to make sure that you are delegating as fully as possible. When doing this, there are 2 critical questions to consider:

- What tasks represent the most strategic and important aspects of my job?
- What tasks provide my staff opportunities for development?

Place a checkmark in the appropriate column depending on whether you would keep the task or delegate it.

Task	Keep	Delegate	In Full	In Part
1. The strategic plan for your unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Recruitment of new staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Researching software needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Decision to terminate a team member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. A conflict between 2 partners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Orienting new team member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Building a relationship with a new patient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Training and developing your staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Recruitment of new providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Leading the annual charitable giving campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Identifying Delegation Opportunities

In the spaces below, list 3 to 5 tasks that you can delegate to your staff.

Item to Delegate	Full or In Part	To Whom	At What Lifecycle Stage
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.
5.	5.	5.	5.

COMMUNICATING THE DELEGATION



Delegation sometimes fails because the manager does not use a systematic process for communicating the delegation. Using the following basic steps will ensure understanding and commitment when you delegate.

1. Explain

- Describe the assignment to the team member, including the reason it's important
- Tell why you have selected him/her and the potential benefits of doing the assignment
- Explain specifically and clearly the assignment's goals and completion date and the expected results
- Specify any procedures or steps that must be followed. (But, as much as possible, let the team member determine the exact methods to be used)
- Specify the degree of authority that the team member will have and the resources and support that will be available

2. Involve

- Ask the team member to summarize his or her understanding of the assignment
- Encourage comments or questions. Be open to the team member's input about the methods, goals, results, and deadlines
- Involve the team member in solving any problems raised

3. Commit

- Agree on the goals, deadlines, results, authority levels, resources, and support
- Agree on follow-up process—meetings, reports, etc
- Affirm your confidence in his or her ability to do the job and thank him or her for the willingness to take on the assignment

DELEGATION PLANNING WORKSHEET

Use this page to plan for an actual delegation that you will be making soon.



1. Explain

- Description of the assignment:

- Results expected:

- Completion date:

- Team member's authority level:

- Why selecting this person:

- Benefits of doing assignment:

2. Involve

- What you will say to elicit the team member's ideas:

- What might be the team member's questions and/or objections:

3. Commit

- What you will say to encourage his/her commitment:

- Follow-up steps you will use (meetings, reports, etc.):

FOLLOWING UP



For delegation to succeed, what happens after the delegation is just as important as what takes place before. Use these tips to implement an effective follow-up process.

Follow-up Dos

- Establish check-in points
- Track progress toward results
- Respect the team member's methods
- Ask to be told about problems before they mushroom
- Provide feedback and coaching, as needed

Follow-up Don'ts

- Resist interfering
- Don't solve problems yourself
- Don't let the team member delegate work back to you
- Don't take back the delegation except when failure cannot be tolerated

“The conventional definition of management is getting work done through people, but real management is developing people through work.”

Agha Abedi

Founder, Bank of Credit and Commerce International



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