



WORKSHOP OUTLINE

Managing Delegation & Initiative

DELEGATION

Effective delegation is one of the most fundamental skill-sets that makes or breaks a manager—and his or her career. Creating high performing direct reports—the number one contribution of “*management time*”—requires a comfort level on the part of the manager to delegate as appropriate and the possession of the skills to make delegation work for both the employee, the manager, and the organization.

When managers fail to delegate effectively it immediately brings to mind the story about the manager who continually brings work home. Always pressed for time, continually juggling priorities, and possessing a high level of commitment to the organization this manager uses weekends and evenings to “*catch up.*” One evening his young son asks mother, “*How come Dad is always working late or bringing his work home?*” Mother responds in the traditional supportive manner, “*Well, Daddy has to put in a great deal of time to provide us with the nice things we have—and his job is very important and people rely on him.*” Undaunted and still confused the son then asks, “*Well then, why don’t they put Dad into a slower group!*”

Learning to delegate *effectively* is how managers develop talent for the organization, provide challenge and responsibility to others, share authority and control, and build and sustain trust. In this session, managers and supervisors will gain insights and practical techniques that will assist them in mastering the skill of effective delegation.

Segment Overview

1. Why Managers Don’t Delegate
 - a. Excuses Managers Make
 - i. Control issues
 - ii. Ego and perception
 - iii. Fear of poor performance
 - iv. Takes too much time
 - b. Delegation Myths
 - i. Dispelling the numerous myths that hinder managers from delegating effectively
 - c. Overcoming Employee Resistance to Delegation
 - i. Consequence management
 - ii. Low employee confidence
 - iii. Fear of responsibility
 - iv. The “dump” factor

2. Delegation Strategy
 - a. What to Delegate
 - i. For time management
 - ii. For development
 - iii. For challenge
 - iv. Routine job responsibilities!
 - b. Who to Delegate To
 - i. High performers
 - ii. Moderate performers
 - c. Establishing Accountability
 - i. Trade-offs
 - ii. First things First
 - iii. Manager's accountability
3. The Art of Delegation
 - a. Expectations and Standards
 - i. Result oriented
 - ii. Clarity and specificity
 - iii. What does good performance look like?
 - b. Levels of Authority
 - i. Appropriate authority
 - ii. Who is to be involved
 - iii. Employee input regarding support
 - c. Levels of Support
 - i. Levels of autonomy
 - ii. "Insurance" for results
 - iii. Resource availability
 - iv. Manager availability
 - d. Monitoring Delegated Tasks/Activities
 - i. Control: tight vs. loose?
 - ii. Shared measurements
 - iii. Performance level pre-requisites
4. Common Delegation Mistakes
 - a. Strategic Mistakes
 - i. Competitive priorities
 - ii. Competing resources
 - iii. Right task/wrong person
 - iv. Right person/wrong task
 - b. Implementing Mistakes
 - i. Inadequate authority
 - ii. Inadequate control
 - iii. Insufficient information

- c. Monitoring Mistakes
 - i. Too little or too much structure/control
 - ii. Taking back initiative

- d. Warning Signs for Poor Delegation
 - i. Unfocused employees
 - ii. Surprised by performance outcomes
 - iii. Routine job responsibilities falter
 - iv. High employee turnover

Learning to delegate effectively, so that it both advances the employee and benefits the organization, is a critical step in the development of any manager or supervisor. When delegation is ineffective or non-existent, the negative effects for the manager, employee, and the organization are destructive. Effective delegation is truly a management skill that uncovers the talents of both managers and employees.

INITIATIVE

Managers and supervisors must cope with the competing responses from two different demands for their time— technical time and managerial time. Technical time demands require them to spend time on the technical requirements of their job. Managerial time demands require them to spend time influencing, managing, coaching, monitoring, and evaluating the performance of others. The effective balance of these two time responsibilities is *not* easy.

These competing demands are more difficult when the work environment the manager creates fails to stimulate and require individual responsibility and initiative. Often, managers are their own worst enemy when it comes to developing initiative and responsibility in their workplace. Their behavior can contribute to the process of “*upward delegation*” where:

- Initiative is transferred from employee to manager/supervisor.
- Manager’s management time becomes technical time—working on things they shouldn’t be working on.
- Employee inaction becomes commonplace.
- A culture of managerial dependency is created.
- Bottlenecks impede fast and quick response to customers and other departments.
- Employee engagement is severely eroded.

Savvy managers and supervisors become adept at understanding the unintended consequences of the improper definition of “helping” their direct reports. This training program will speed up the initiative and delegation learning curve and provide managers and supervisors with the skill sets and techniques to keep initiative with the appropriate person and create more personal responsibility in the workplace. Ultimately, initiative and responsibility can only be defined as “taking action”, since without action these characteristics don’t exist. Ensuring an *action orientation* on the part of direct reports is a *critical* component of management time. The competencies developed in this workshop will aid managers in making that contribution to organizational goals.

Segment Overview

1. Who Is Taking the Initiative?
 - a. Initiative Defined
 - i. The initiative myth
 - b. Who's Got the Monkey?
 - i. Who currently has the monkey and who should have it
 - c. Improper Initiative Transfer
 - i. How initiative is transferred
 - ii. The seduction of the manager/supervisor
2. How Initiative Gets Transferred From Employee to Manager
 - a. Managerial Mindsets
 - i. Role requirements
 - ii. Flawed definition of "Help"
 - iii. "The problem solver"
 - iv. Managerial Ego
3. Consequences of Misplaced Initiative
 - a. Employee Welfare Abuse
 - i. Dependency
 - ii. Learning curve erosion
 - iii. Barriers to creativity and innovation
 - iv. Reduction of responsibility
 - v. Eroding accountability
 - vi. Renters vs. owners
 - vii. Limits on employee potential
4. Keeping Initiative in the Proper Place
 - a. How to Keep the Next Action With the Right Person
 - b. In the Loop—But not in the Action
 - c. Questions—Not Answers!
 - d. Completed Staff Work—Recommendations or Solutions
 - i. Complete background information
 - ii. Consequences of status quo
 - e. Reports of No-progress
 - f. Face-to-face Conversations Whenever Possible

Managing initiative is a critical step in the process of performance management. When initiative is misplaced, the negative effects for manager, employee, and the organization are destructive. And proper initiative creates a platform for effective delegation—a management skill that truly uncovers the talents of both managers and employees.