



# OBJECTIVES

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

- Identify tasks to delegate
- Match the delegated task to the right team member
- Prepare for the handover of the task
- Establish responsibility and accountability
- Provide effective feedback on delegated tasks

## TAKE TIME TO THINK ABOUT DELEGATION

Do you think you delegate enough? If not, what's holding you back?

Think about a typical day, how much of that day is spent doing tasks that are not managerial in nature?

If you had an entire day free, what steps would you be taking to make your vision for the department a reality?

## WHY DELEGATION SOMETIMES DOESN'T HAPPEN

Though delegation is important, too often it's not being done because managers:

- Lack trust that team members can get the job done right
- Want to show team members they are willing to do what they expect of their team
- Enjoy doing departmental tasks, and may not be comfortable yet with their managerial duties

Whatever the reason, the result will be the same:

- No time to plan for future, so stuck putting out fires in the present
- Team members will feel disempowered, causing low moral within the team

# WHY DELEGATE?

Delegation is an important part of making your vision a reality

- Delegation is about empowering your team to become more autonomous, efficient, and creative
- As they stretch their skills and abilities, they will be able to take on larger and more complex tasks, freeing your time for managing

# IDENTIFYING TASKS TO DELEGATE



An effective manager spends time wisely

Track how you spend your time for a week

- Set a timer for every hour and when it goes off, record the task you are doing
- At the end of each day, think about what you did and write down your tasks
- Look back at every e-mail you sent in the last week





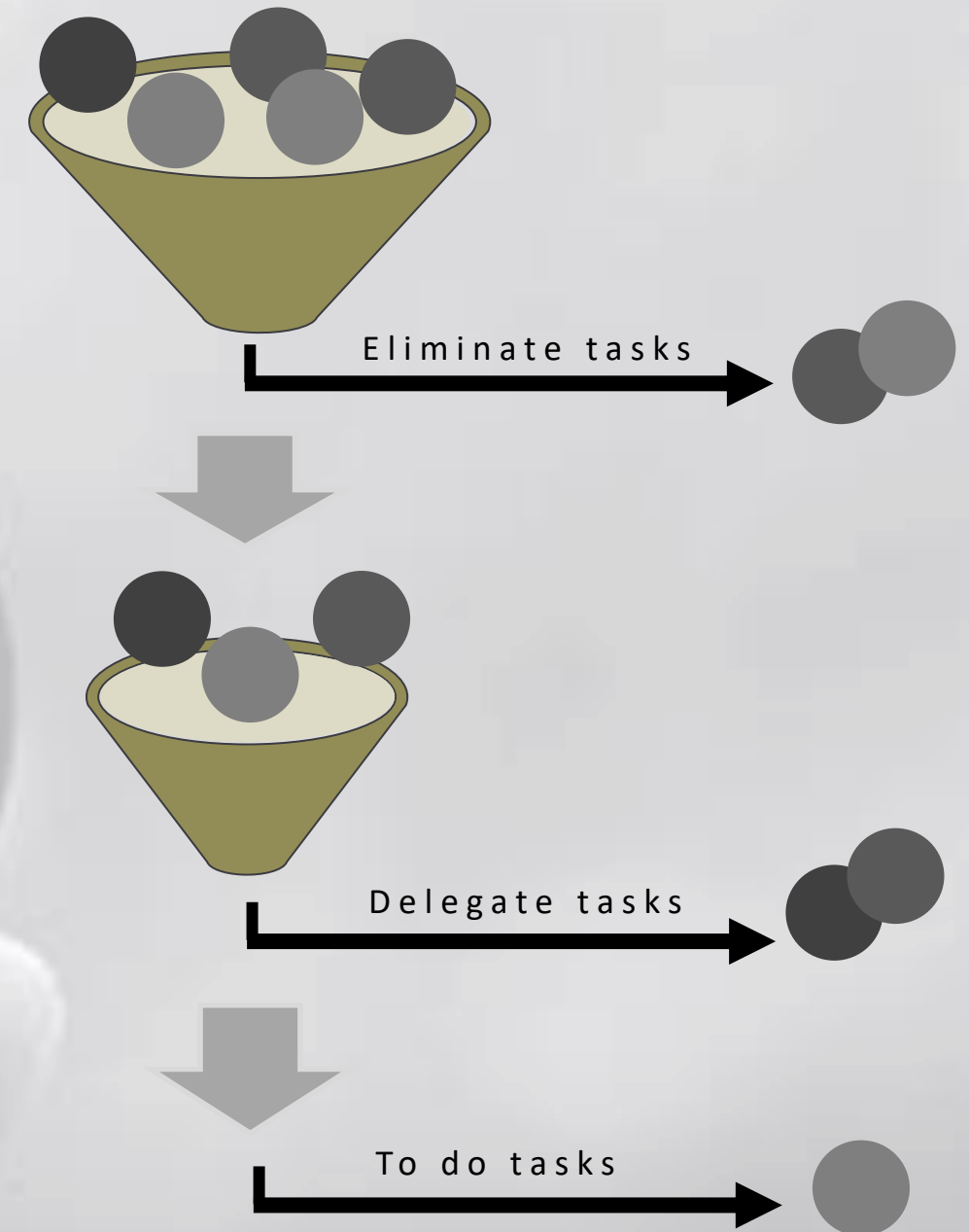
# IDENTIFYING TASKS TO DELEGATE



Funnel your tasks down to the ones important for you as a manager

Look at each task with a critical eye

- Does this task need to be done? What's its value?
- Are you the appropriate person to do the task?
- Is it a managerial task, or something a team member could take on?
- Should you delegate this task?



# IDENTIFYING TASKS TO DELEGATE



Managers focus on strategizing; team members focus on execution

## Managerial tasks should not be delegated

- PLANNING
  - How to achieve your vision for the department
- ORGANIZING
  - Tasks, schedules, and resources
- LEADING
  - Providing direction, motivation, coaching
  - Regulating, checking results against goals and proving feedback





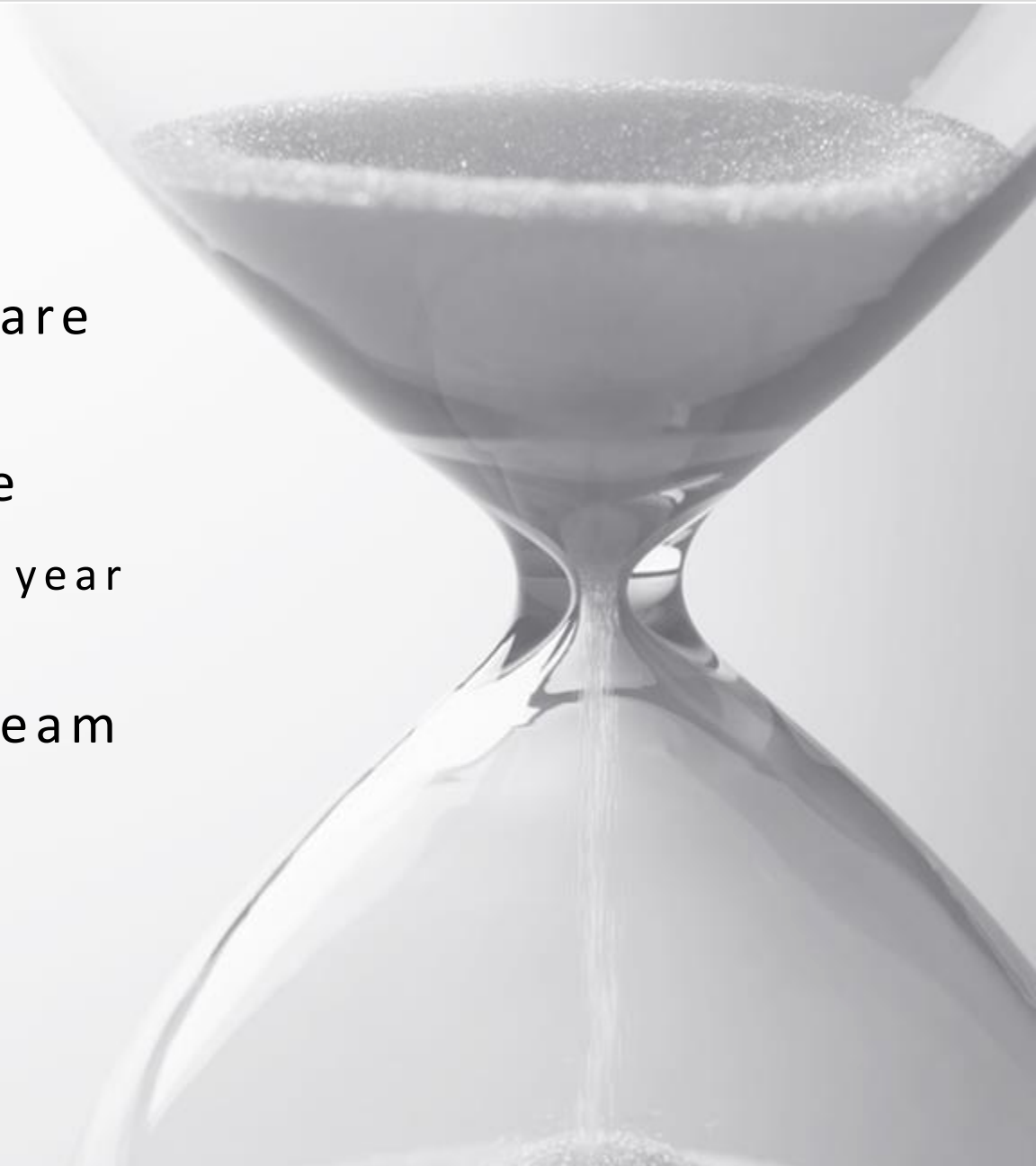
# IDENTIFYING TASKS TO DELEGATE



Any task that is not managerial in nature can be delegated

## Types of tasks to delegate:

- Time consuming tasks, regardless of whether they are mundane or complex
- Quick tasks that might collectively fill up your time
  - 💡 A task that takes 10 minutes a day each week, over a year will be about 43 hours spent on this small task
- Ones that are good for developing the skills of a team member



# IDENTIFYING TASKS TO DELEGATE



## TAKE TIME TO THINK

Take a minute to think about the tasks you did yesterday or today

- Did the task need to be done by YOU? What did it accomplish?
- How much manager-specific work did you do? How much non-manager work did you do?
- What is ONE task you could have delegated?



# DELEGATING TO THE RIGHT TEAM MEMBER



If your team members feel empowered by your selection of them, then you have made a giant step toward the success of the task

Things to consider when matching tasks to team members:

- The level of experience and skills necessary for the task and which team member fits within that scope
- How challenging the task will be for the team member
- How much time the task will take and the work-loads of the team members
- Attitude, motivational levels, and personal team members' goals

*Run  
Tests*



*Make  
charts*



*Review  
Result*



# DELEGATING TO THE RIGHT TEAM MEMBER

- 1 → 😬
- 2 → 😊
- 3 → 😬
- Match the more critical tasks to the more experienced and trusted team members

		Low experienced team members → High experienced team members			
Tasks <u>low</u> in criticalness or difficulty  ↓  Tasks <u>high</u> in criticalness or difficulty	Tasks to delegate	Team member 1	Team member 2	Team member 3	Team member 4
	Task 1	X			
	Task 2		X		
	Task 3			X	
	Task 4				X

- A good understanding of your team members’ strengths and weaknesses will help determine who should receive what task
- Team members may have varying skill sets so they may be experienced for one task but not for another

# DELEGATING TO THE RIGHT TEAM MEMBER



## DISCUSSION

The purchasing software has an extensive update that has been installed. You need to know how this is going to affect all the procedures that are done on the software. Who would you assign this task to:

### MARY

- Has worked for Mazda for 10 years
- Is a high performing Senior purchasing agent
- Seems content at her job, but looking forward to retirement
- Has done this type of task in the past

### MATEO

- Has worked for Mazda for 3 years
- Makes more minor mistakes on forms than anyone in department
- Has highest output on the team
- Motivated to be senior purchasing agent

### TED

- Has worked for Mazda for 5 years
- Has almost no errors on his forms, but doesn't have as much output as others
- Has low motivation and is not a senior purchasing agent yet
- Doesn't seem happy with his position

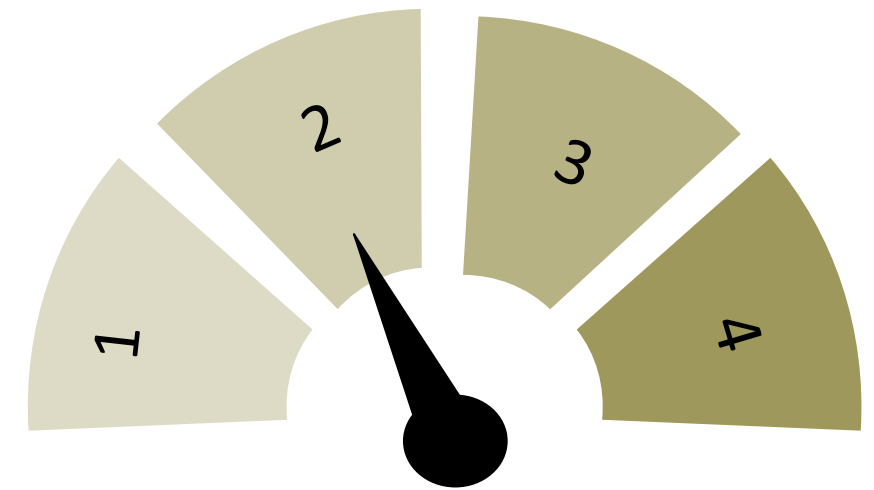
# DELEGATING TO THE RIGHT TEAM MEMBER



When you delegate, you are sharing some or all of your authority

## Delegation scale

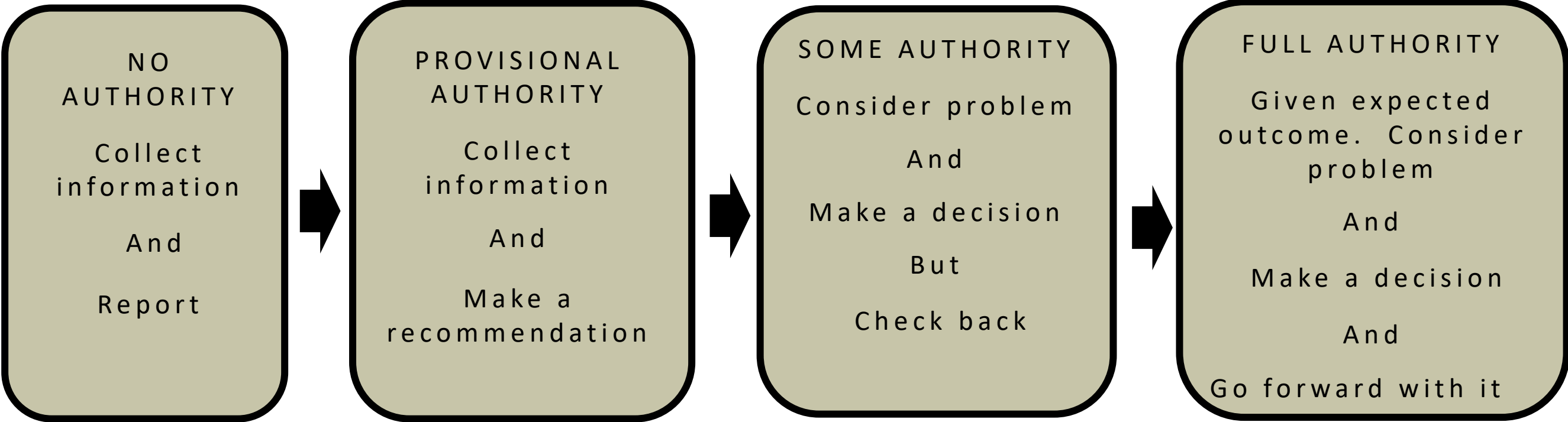
- Is a gradual scale of 4 levels showing how much authority is granted to a team member when a task is delegated
  - Authority means the power to make decisions about the assigned task
- Best to try and move your team members up the delegation scale
  - Free up more of your time
  - Task will require more competency, autonomy, and creativity from the team member
  - The higher up on the delegation scale, the more empowered team members will feel





# DELEGATING TO THE RIGHT TEAM MEMBER

## DELEGATION SCALE



Creativity					
Competency					
Autonomy					
Accountability					
Responsibility					

# DELEGATING TO THE RIGHT TEAM MEMBER

A survey is needed to find out if Mazda should invest in a sales tracking app to introduce to the MNAO dealership partners.

NO AUTHORITY	PROVISIONAL AUTHORITY	SOME AUTHORITY	FULL AUTHORITY
<div>You draft the survey</div> <div>You create a spreadsheet</div> <div>You provide specific instructions for data input</div> <div>Team member inputs survey data for you to review</div>	<div>You draft the survey</div> <div>You create a spreadsheet</div> <div>Team member inputs the survey data</div> <div>Team member make a recommendation about the app</div>	<div>You draft the survey</div> <div>Team member creates the spreadsheet</div> <div>Team member enters survey data</div> <div>Team member makes app decision</div> <div>Team member reports to you for decision approval</div>	<div>Team member is asked to find out if the sales tracking app is needed for the MNAO dealership partners</div> <div>Team member can act on their decision</div> <div>Team member reports back on successes and lessons learned</div>

# DELEGATION TO THE RIGHT TEAM MEMBER

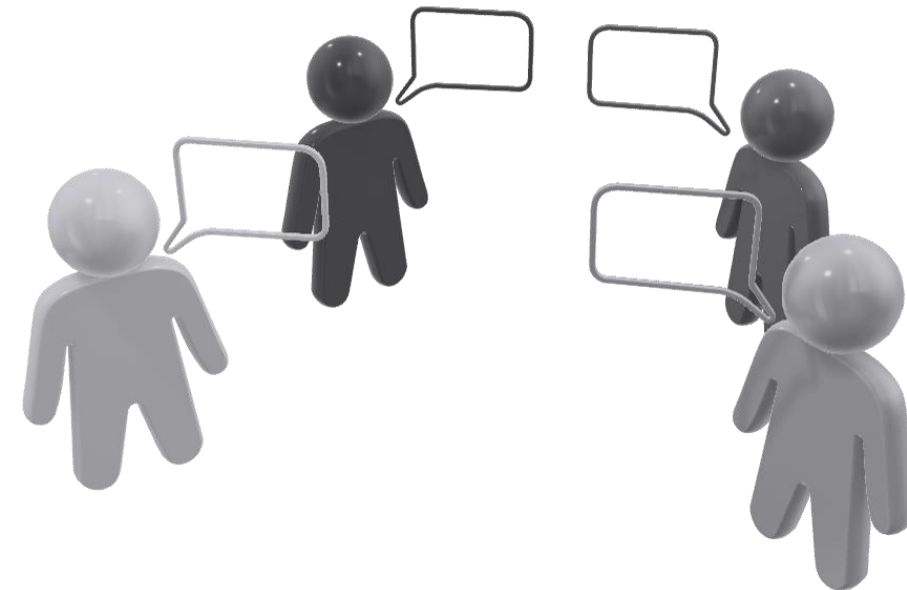


## DISCUSSION

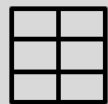
Review the task below, then describe what each delegation level would consist of and what outcome would be expected from the team member. Consider what you trust them to do? What will you need to walk them through? And What would you need to do for them?

Task: Create a shock absorber test for the part, run the test, and determine if the part can be transported safely overseas.

- Level 1 – no authority
- Level 2 – Provisional authority
- Level 3 – Some authority
- Level 4 – Full authority



# DELEGATING TO THE RIGHT TEAM MEMBER



Use this chart to consider which tasks to use to raise team members delegation levels

<u>Criticalness and difficulty of task</u>	<u>Delegate to whom and at what level</u>
Not very critical/ not very difficult	Use these tasks to raise delegation level of team members at delegation level 1 <b>From 1 to 2</b>
Somewhat critical/difficult	Use these tasks to raise delegation level of team members at delegation levels 2 or 3 <b>From 2 to 3</b> or <b>From 3 to 4</b>
Most critical or difficult task	Fully delegate to team members who are already at delegation level 4

# DELEGATION TO THE RIGHT TEAM MEMBER



## DISCUSSION

Task: Create a shock absorber test for the part, run the test, and determine if the part can be transported safely overseas.

Assuming the task is not critical and the due date is a month or two out. How would you delegate the task to different team members, raising the delegation level of one or two of them?

### REMY

- Has been with Mazda for 20 years
- Worked 10 years in testing before being promoted to stress engineer
- He has a good understanding of transportation requirements
- He is working on a few noncritical parts and one critical assembly

### HIROMI

- Has been with Mazda for 5 years
- Has little testing experience
- She does know how to run the test
- She might have trouble finding the transportation requirements
- She currently has a light load of drawings to review

### JOSE

- Has been with Mazda for 2 years
- Has shown great interest in creating and running tests
- He has created a test and ran it successfully
- He's good at finding out information on his own and can easily find the transportation requirements
- He just finished a critical project and needs more work

# PREPARING FOR THE HANDOVER



To stay focused on important matters, to make sure deadlines are met, prioritize the task

## PREPARING FOR THE HANDOVER MEETING

- Manager's prioritization
  - Prioritize the task you will delegate
  - To help you prioritize the task, ask yourself:
    - How critical is this task compared to others that need to get done?
    - How does it fit in with the Department's vision?
    - When does it need to be accomplished by?
- Team Member's prioritization
  - Consider what other tasks they are currently involved in
  - How does this new task fit in? Is it more important or less?





# PREPARING FOR THE HANDOVER



Clarify the specifics about the task so that you can clearly convey them to the team member

## PREPARING FOR THE HANDOVER MEETING

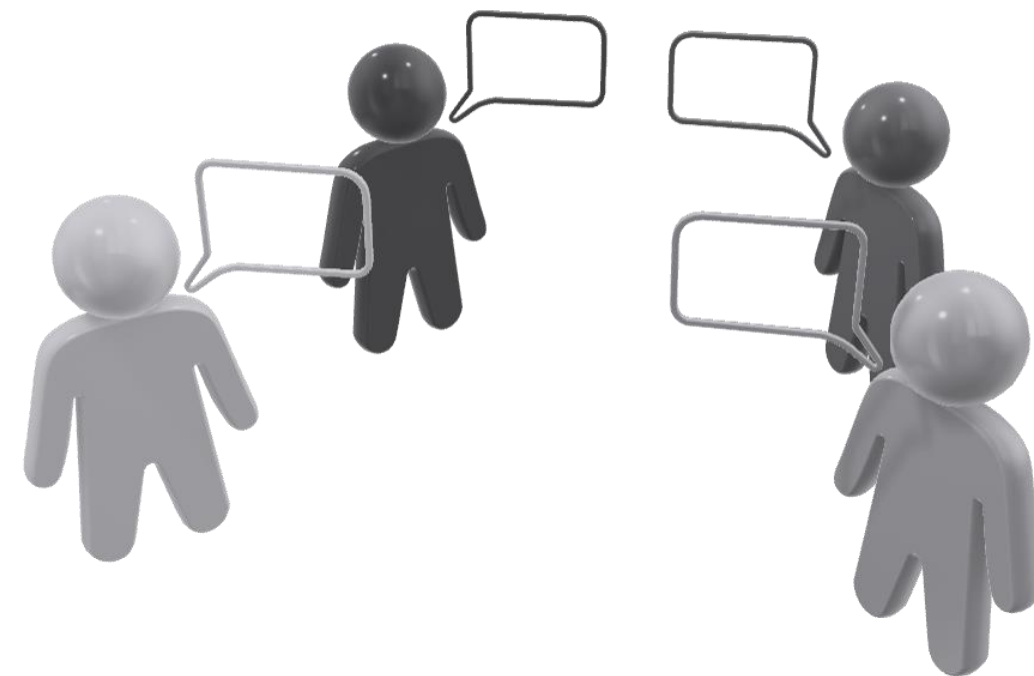
- Context and definition of the task
  - This will depend on the level of delegation
    - Lower levels require more specific instructions, higher levels require less
- Desired outcomes
  - Understand why the desired outcome is important to the department and to Mazda's organizational goals
- Due dates
  - Need to be specific
  - Should be open to discussion with the team member
  - Check-points are important





Recall the sales app example: A survey is needed to find out if Mazda should invest in a sales tracking app to introduce to the MNAO dealership partners

- Consider what the outcome would be for each level of delegation
  - Level 1 – no authority
  - Level 2 – provisional authority
  - Level 3 – some authority
  - Level 4 – full authority



# PREPARING FOR THE HANDOVER



## TAKE TIME TO THINK

Think about a task that you could delegate.

- How critical is this task compared with other tasks that need to be done?
- Can you estimate when the task might need to be done by?
- What are some checkpoints for this task?



# HANDING OVER THE TASK



Team member should know and agree to what they are responsible and accountable for

Three factors of delegation to consider for a handover meeting

- **AUTHORITY** – the power to make decisions
- **RESPONSIBILITY** – the obligation to complete a task
- **ACCOUNTABILITY** – ownership of the task which includes justifying your decisions

Factors	Manager	Team Member
Authority	Some of it or none of it at full delegation	Some of it or all of it at full delegation
Responsibility	Managerial support and possibly some of task completion	Some of task completion or all of it
Accountability	To their manager for making sure the task is done successfully	To their manager for doing some or all of the task successfully



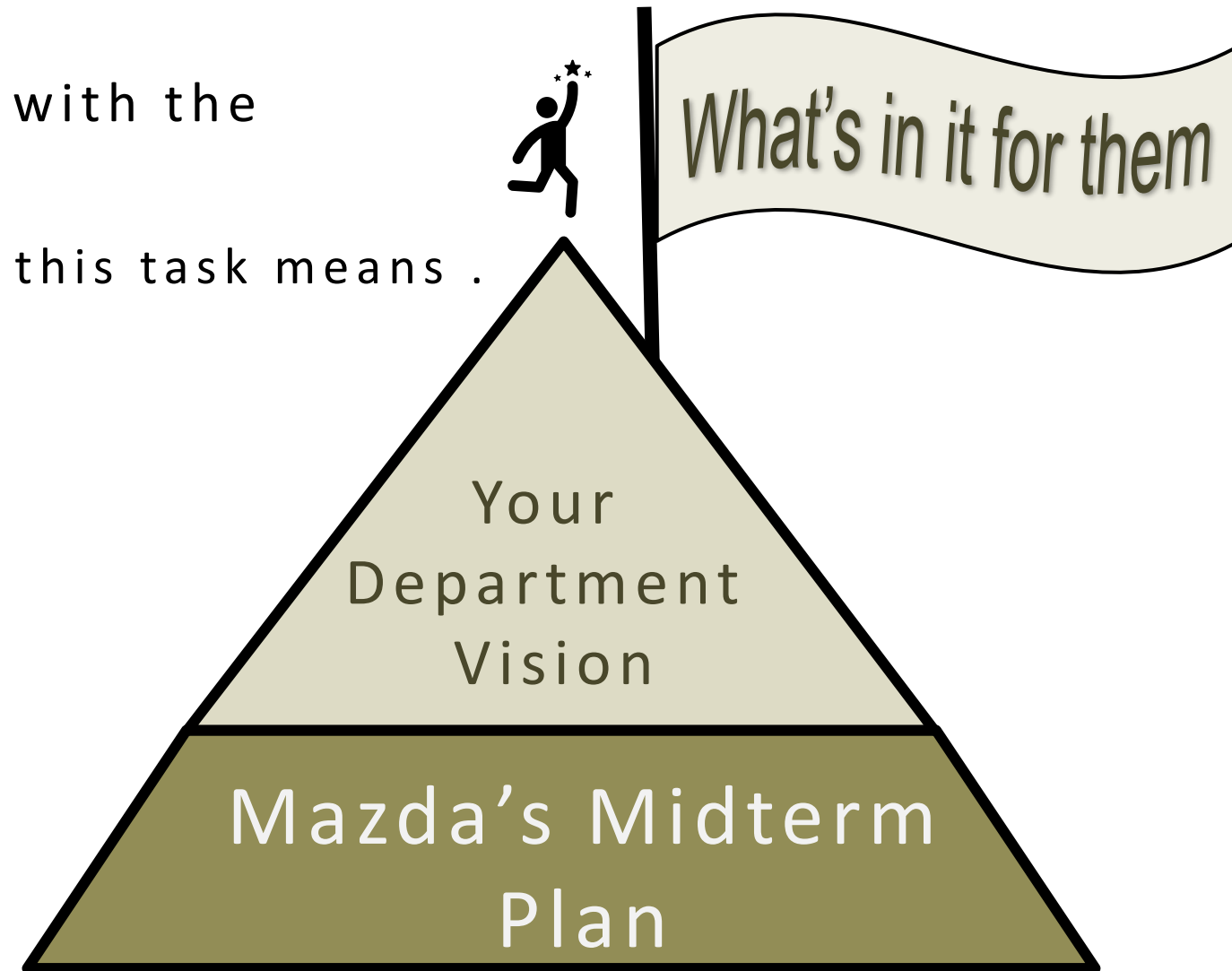
# HANDING OVER THE TASK



When handing over a task, make sure you focus on motivating the team member

## Motivation for the responsibility

- Show the big picture of how the task fits in with the department and Mazda's mid-term plan
  - Give one succinct sentence: your success at this task means . . . (impact on department and/or Mazda)
- Explain what's in it for them
  - Give one succinct sentence: This assignment will . . . (how it benefits them specifically)
  - Example: This assignment will give you the opportunity to learn the new sales app that I know you have been looking forward to learning



# HANDING OVER THE TASK



Your tone and demeanor should portray confidence in the team member

## Clarify the Team member's responsibility

- Clearly explain what part of the task the team member is responsible for
  - Remember this will depend on the delegation level
  - Be direct and go slow
  - Don't assume they know what you know
  - Visuals are helpful such as previous examples or demos
- Make sure they understand all that the responsibility entails
  - Ask questions, such as is there anything still confusing you? Or are you clear on what you are responsible for?
- Get their agreement that they will complete the task by the due date



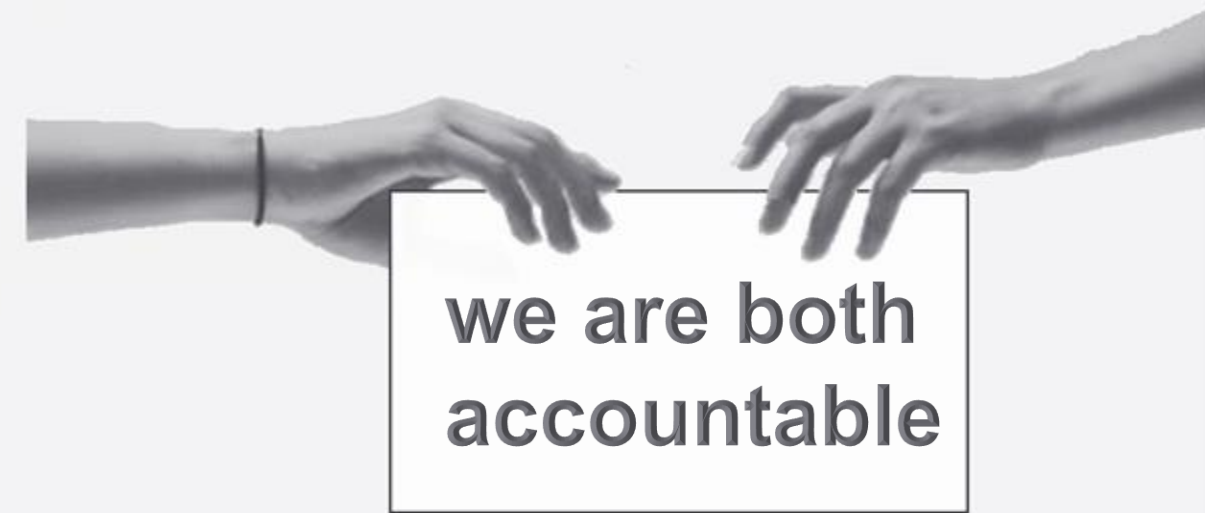


# HANDING OVER THE TASK



Make sure the team member agrees with their accountability for the delegated tasks

- Manager's accountability
  - The successful completion of the task
    - Keeping communication open during the process
    - Support team member with resources and motivation
    - Give effective feedback
- Team member's accountability
  - Completing some or all of the task on the specified due date with the agreed upon expected outcome
  - Make sure team member understands the desired outcome that they're accountable for



# HANDING OVER THE TASK

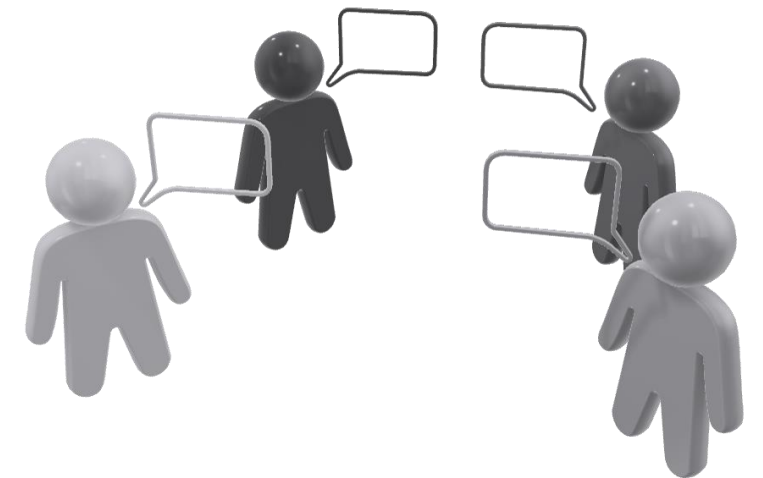


## DISCUSSION

Answer the questions concerning this scenario

The VP of engineering received a complaint from one of their customers that the specification sheet had some errors in it. Ida assigned this task to Abdullah with full delegation. When the VP of engineering contacted Ida, she said “I don’t know anything about the errors, and I don’t know how to fix them. I assigned that specification sheet to Abdullah, so it’s his responsibility.”

- What authority did Abdullah have? And Ida?
- What responsibility did Abdullah have? Is he accountable for the error?
- Do you think Ida’s response was a valid one? Why? Or Why not?



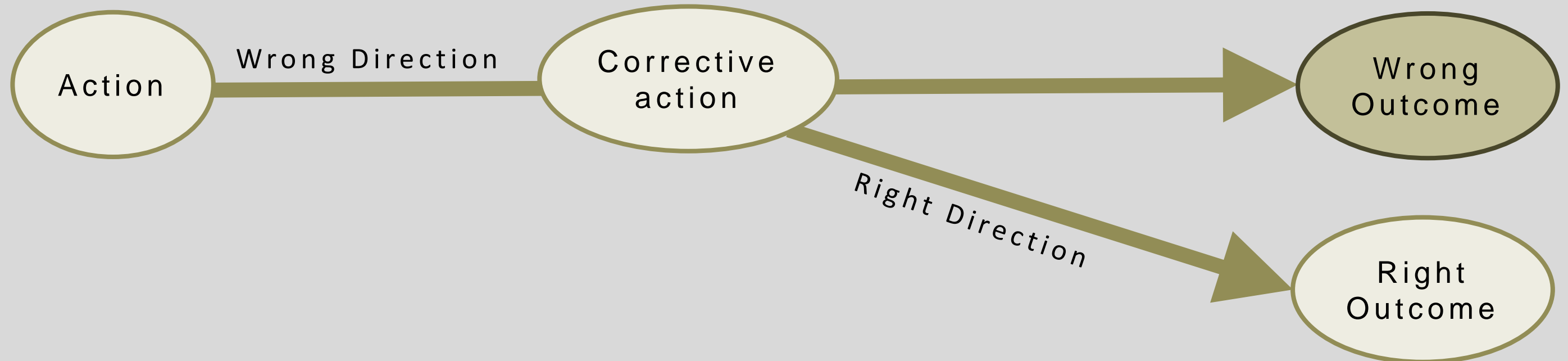
# PROVIDING CONSTRUCTIVE FEEDBACK

👍👎 Timely and effective feedback leads to corrective action, which leads to the right outcome

## FEEDBACK

Information about a past actions that guides future actions

### Constructive Feedback



# PROVIDING CONSTRUCTIVE FEEDBACK



Always show confidence in the team member's ability

## General guidelines for feedback approach

- Deliver negative feedback privately
- Focus on their behavior or tasks, not the person
- Be specific
- Be timely
- Have a positive attitude
- Start with changes they can be successful with
- Tie your feedback to the core competencies
- Show you still believe in their competency



# PROVIDING CONSTRUCTIVE FEEDBACK



Think about how you want to approach the situation before talking to the team member

## How to give constructive feedback

- Use “I think” statements to state an opinion rather than “You should” to make a demand
  - Correct: I think the last couple of slides in your presentation could use some more graphics.
  - Not: The last part of the presentation doesn’t work; you should change it.
- Try to start with a positive statement and then add your critique
  - Correct: I’m glad you are considering different solutions, is there anything else you can think of?
  - Not: No, those ideas don’t work, you should think of something else.



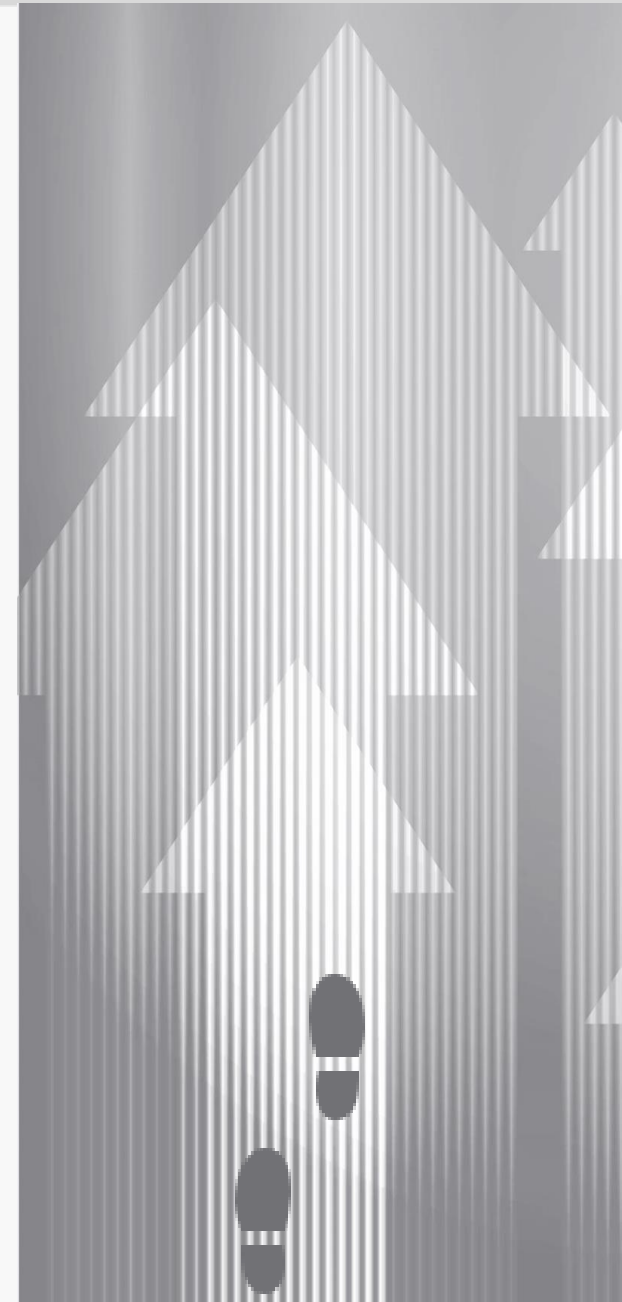
# PROVIDING CONSTRUCTIVE FEEDBACK



Finding out what the issue is takes you one step closer to solving it

## How to give constructive feedback

- Find out why things went wrong
  - Correct: I noticed that your support ticket numbers dropped recently. Why do you think that is?
  - Not: Your support ticket numbers have dropped recently, you had better get them up.
- Acknowledge their feelings
  - Correct: I know you're disappointed that your support ticket numbers dropped. How can I support you on this?
  - Not: Your ticket numbers can't continue to drop, or your job will be at risk.





# PROVIDING CONSTRUCTIVE FEEDBACK



## DISCUSSION

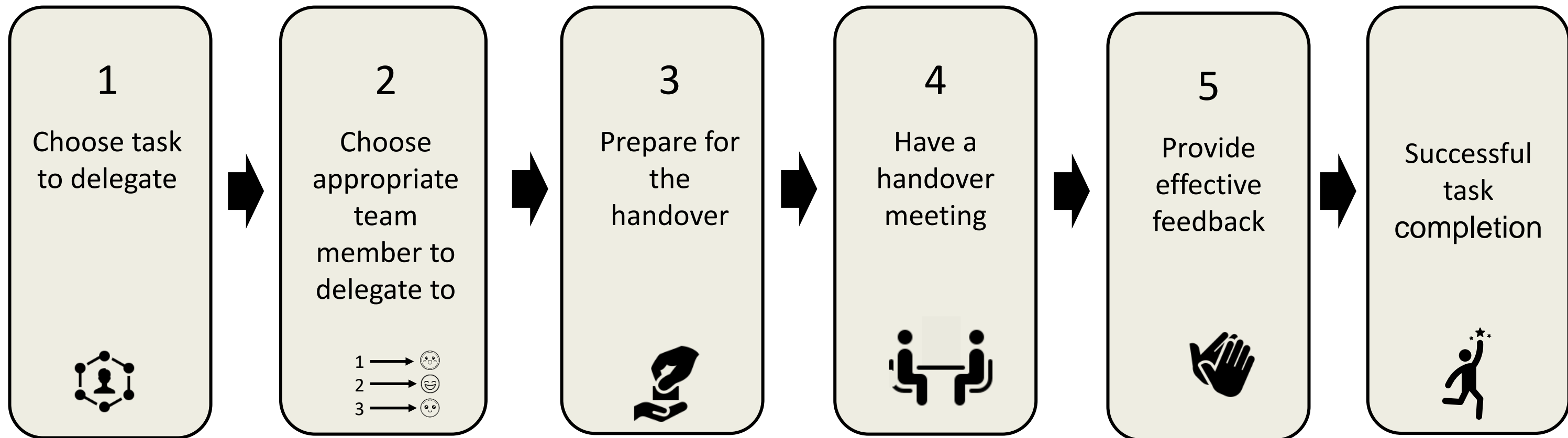
Discuss how to make each negative feedback statement more constructive and more centered on the core competencies of *inspiration, innovation, collaboration, and adaptability*

- Your customer satisfaction rating has decreased by 15%, you need to bring this up.
- Why did you use those tolerances?
- Everyone else met or exceeded their sales target for this quarter but you; I expect to see better numbers next quarter.



# OVERVIEW OF THE DELEGATION PROCESS

## STEPS TO SUCCESSFUL DELEGATION



We have discussed and practiced:

- Identifying tasks to delegate
- Matching the delegated task to the right team member
- Preparing for the handover of the task
- Establishing responsibility and accountability
- Providing effective feedback

Do you have any final questions?

