



Unit 8

Delegating For High Performance

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Clearly identify how delegation fits into your job and how it can make you more successful
- ✓ Identify different ways of delegating tasks
- ✓ Use an eight-step process for effective delegation
- ✓ Give better instructions for better delegation results
- ✓ Recognize common delegation pitfalls and how to avoid them
- ✓ Monitor delegation results
- ✓ Give effective feedback

Unit 8

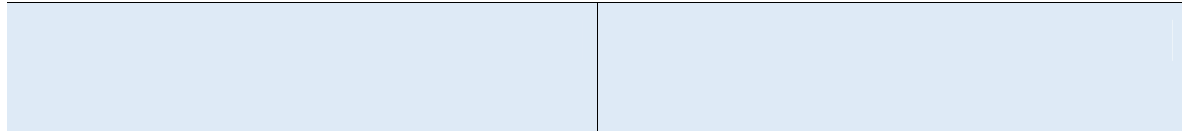
An introduction to Delegation

Why Delegate?

Advantages and Disadvantages

Use the chart below to record the advantages of delegating and the disadvantages (or reasons why managers don't delegate).

Benefits/Advantages	Disadvantages/Why you don't delegate



Debrief

Have you ever looked at the final product of a task you had assigned somebody else and realized you didn't get what you wanted, and you would have to redo it yourself? Initially it may seem like the person who was assigned the task has failed, but that's not really the case. As you learn more about delegation, you may begin to realize it was you as the delegator who failed.

As a supervisor or manager, you will likely always have responsibility for more things than you can handle by yourself. You cannot adequately plan and perform every task. If you feel your employees aren't ready to take on tasks by themselves and you never delegate, they never will be ready.

Added to this mix, we have the dilemma of the new supervisor who isn't confident and sure of their role, and the traditional manager who thinks there is only one right way of doing anything.

Delegation Do's and Don'ts

Things To Do

- Ñ Specify the results expected
- Ñ Explain why you are delegating
- Ñ Give the necessary authority to carry out the tasks
- Ñ Let others know of the delegation
- Ñ Have confidence in employees

Things Not To Do

- Ñ Delegate just trivial tasks
- Ñ Expect others to do the job as well as you can. They need to learn
- Ñ Delegate haphazardly
- Ñ Be an autocratic delegate
- Ñ Check constantly to see how things are going (micromanaging)
- Ñ Take credit for results achieved by staff
- Ñ Overload employees

Self-Assessment

We can see there are some pretty good reasons for improving our delegation ability. How do you know whether you need help or not? Consider your own role as a manager over the last three months and answer the questions below.

	Never	Sometimes	Often	Always
I find myself working longer hours than those who report to me.				
I take work home or come in on weekends or days off.				
I have difficulty keeping up with the paperwork associated with my job.				
I end up doing tasks for others that they should do themselves.				
I find myself rushing to meet deadlines.				
I find myself doing a lot of routine or technical tasks.				
I feel as though I'm always under a lot of pressure and stress.				
I find myself making the decisions affecting my work group.				
I don't spend enough time on managerial functions, such as planning work or interacting with people.				
Those who report to me have to seek my approval before they can take an action.				

On a scale of 1-10 (where 1 is poor and 10 is excellent), how would you rate your ability to delegate?

What is Delegation?

Delegation Definitions

Defining Delegation

What do you think that delegation means? Is it delegation to assign somebody the work that you don't want to do? Is it delegation to assign work to somebody when you are busy and then to reclaim it again when you have more time?

A common definition of delegation is entrusting power and authority to a person acting as your representative. While that may seem a little abstract, it really captures the meaning well. Another way to define delegation is getting your work done through other people.

It's more than simply assigning work. Delegation also involves making an investment in a person for the future and helping them to increase their own skills.

In the broadest sense, delegation involves five things:

- Ñ The training and development of your staff
- Ñ The direction and follow-up of assignments
- Ñ The analysis of performance problems
- Ñ Coaching to overcome problems
- Ñ Periodic formal evaluations of performance

Four Basic Steps to Delegation



Deciding What to Delegate

Part of preparing to delegate is deciding what tasks you can and cannot delegate. Tasks can generally be placed in one of five categories:



Levels of Delegation

The Five Levels

Delegation doesn't have to be all or nothing. In fact, you should consider what level of delegation is appropriate for the task, the employee, and the situation.

Here is an overview of the five levels of delegation:



Breaking Down the Model

Let's say that we want an employee to prepare a summary report of their work over the past year that will be submitted to the executive team. How will each level of delegation look?

The **first level of delegation** is to have the employee perform the task exactly as instructed with no independence. In our example, we might give the employee a report template, the data, and similar reports. Then, we'll ask them to complete the report and submit it by a certain date.

The **second level of delegation** is to allow the employee to do some research (if necessary) and then give you options for the task. You make the decision and the employee completes the task according to your instructions. In our example, the employee might research different formats and give you some different options. They may also draft a list of items that they want to include in the report. Then, you will outline the format and contents for them. They will complete the report and submit it by a certain date.

The **third level of delegation** is similar to the second, except that an employee makes a recommendation. Continuing with our report example, the employee would recommend a format and possibly prepare an outline. You would approve it and ask the employee to complete and submit the report.

The **fourth level of delegation** is where independence really comes into play. This is the level that you will use most often once team members get up to speed. With our report example, you would simply ask the employee to complete the report and submit it by a certain date. (They may use existing procedures or templates, but the bulk of the decisions are up to them.) You would then review the report, approve it, and send it to the executive team.

The **fifth level of delegation** gives the employee complete freedom. With our report example, you would ask the employee to complete the report and submit it directly to the executive team. You may ask the employee to send you a copy of the report, but you would not have any active role in it.

Guidelines for Success

When should you delegate some of your work?

- Ñ After you have been in the job long enough to understand what it entails.
- Ñ When you have completed a skills, abilities, and interests inventory of your team members (formally or informally).
- Ñ When you understand the value of delegating.

What are some ways to prepare for delegating?

- Ñ Draw up a list of the current job responsibilities that you would leave behind if you were to suddenly leave your job.
- Ñ List the team members qualified to take over each of these responsibilities. If there is no one to take over a responsibility, leave a blank space.
- Ñ When the list is complete, add up the blank spaces to see what kind of department you would leave if you were suddenly out of the picture.
- Ñ Are you satisfied with the results?

What tasks should you delegate?

- Ñ Tasks that can be handled adequately by team members.
- Ñ Tasks for which team members have all the information for decision-making.
- Ñ Tasks that don't require skills unique to you or your position.
- Ñ Tasks for which an individual other than you can have direct control over the task.
- Ñ Tasks and/or projects that will contribute to growth and development of the individual who will carry out the assignment.

What tasks should you not delegate?

- Ñ The delegation process itself: Any work to be delegated should be delegated and explained by you.
- Ñ Performance evaluations and disciplinary actions: These are a managerial responsibility.
- Ñ Coaching, counseling and morale problems.
- Ñ Planning and forecasting: Some of the detail work can be done by others, such as calculations and research. However, you alone are in a position to decide how departmental goals fit in with the overall organization's goals.
- Ñ Confidential tasks and tasks that have been specifically assigned to you by your manager.
- Ñ Complex situations: Don't ask someone else to handle what you don't understand yourself.

How do you know whether you are delegating well or not?

If you are delegating well.

- Ñ You are satisfied with the way staff members complete work assignments.
- Ñ Team members feel committed and involved and morale is high.

If you are not delegating well, you may see these symptoms:

- Ñ You are too busy with work and under constant pressure.
- Ñ You are spending too much time on organizational details.
- Ñ Team members leave because they don't feel challenged or that they are learning, or they feel that you are difficult to work for.
- Ñ You have been bypassed for a promotion because you have difficulty handling your current responsibilities.

Note: If you feel you aren't delegating well, confirm or put your suspicions to rest by seeking feedback from your team. If your suspicions are confirmed, formulate a plan to improve.

Lateral Delegation

In flatter organizations without multiple management and reporting layers, teams can be largely self-directed, but there is still room for delegation to take place. This is particularly useful when you are involved in (or even leading) project teams made up of people at the same levels within the organization. When you delegate to your colleagues (not your subordinates), we call this **lateral delegation**.

Like regular delegation, lateral delegation allows you to have other people work to their strengths. It also allows you to help others develop skills and expertise, and frees up your time for your own development.

The same guidelines discussed previously apply to lateral delegation. You must not delegate things that are specifically yours to do and you must not give away work that you simply do not like to do. Lateral delegation is about asking a team member to take on the assignment and ensuring that they are both ready and able to accept the work.

Pre-Assignment Review

Here are the answers for the case study assigned before the workshop.

1	Assign sections of the departmental plan to individual travel agents.
5	Gather data on political stability, military, and police activity.
1	Assess whether reports are of acceptable detail and quality.
2	Determine what objectives will be included in the departmental plan.
1	Schedule the number of analyst hours to be allocated to each project.
4	Meet with local officials to get their input on feasibility of tourism in new areas.
3	Write training and development plans for staff.
4	Visit interplanetary locations to determine their suitability as holiday and business destinations.
2	Present information about upcoming travel packages to the marketing department for them to design marketing materials.
1	Keep track of departmental budget.

Legend:

1. She must do it.
2. She should do it, but someone else could help her.
3. She could do it, but others could do it if given the opportunity.
4. Others should do it, but she can help out in an emergency.
5. Others must do it.

Picking the Right Person

So far, we have looked at the definition of delegation and deciding what to delegate. The next step is deciding who to delegate to. How do you pick the right person for the job? Here are some things to consider.

Demonstrated Skill

Who is capable of completing the assignment? What is their record on similar assignments? If you have new employees, you should have a sense of their skills. You may even have completed a formal inventory.

Ask yourself:

- Ñ How will this person fit in with other that they must work closely with?
- Ñ In which situations does this person operate best?
- Ñ Are the employee's skills appropriate for the task? (Giving someone a task that they are overqualified for can make the task boring. Likewise, if the employee is underqualified they may find the task frustrating.)
- Ñ If you have nobody readily capable, can somebody be trained to do the task? Who could be trained? How long would it take?

Employee Motivation

This is as important as ability. Does the employee want to do the task? Can you help motivate them? Remember, this is a good opportunity to involve team members and give them a chance to try something different.

Employee Workload

Decide if the team member has the time available. How much are they currently doing? How well are they handling the workload they have? How does their workload compare with others in the department? Their level of interest in accepting more tasks is often a good barometer of their level of ambition. Be wary, however, of deciding that a person's workload is too heavy or that the person would not be interested. First, talk with the person and gauge their interest.

Matching Skills and People

Even if you have knowledge about the person's skills, their workload, and their potential for success, delegating can still be tricky. If given the chance, people may do very well at activities they never previously attempted. The person with enough time is not necessarily the right choice either, as the busiest person is often best at working efficiently.

Given these variables, consider what the best means of achieving the overall goals of the department is. Are team members encouraged to take individual initiative and accept greater responsibility? Are those seeking greater responsibilities being rewarded and recognized?

You can also base delegation on the employee's desire to grow. Once they have had a chance to interact with employees, new supervisors can begin devising plans to train and develop their employees. A key aspect of this is finding tasks you can delegate and match them to the workers with the readiness to successfully complete the tasks and benefit from the assignments.

One way to do this is to:

- Ñ Inventory the skills and interests of your employees.
- Ñ Rank employees according to their readiness to learn and grow, keeping an open mind about who belongs in each category.
- Ñ Work on upgrading low performers, developing the high performers, and preparing average workers to maximize their strengths.

The Delegation Meeting

The delegation meeting has eight specific steps to it. We recommend that you review these steps before your meeting so that nothing is left out. This will also help you provide a thorough orientation to what is being delegated.

Step One

Clearly communicate to team members what they are being asked to do. This should include the following information:

- Ñ What specifically needs to be done?
- Ñ When should the task be completed?
- Ñ What are the consequences of the task not being completed on time for the organization and the employee?
- Ñ What level of accuracy is needed?
- Ñ How does the task fit into the overall scheme?
- Ñ How many parts are there to the entire project?
- Ñ Who is working on other parts of the task?

Step Two

Provide context and relevance to the assignment.

- Ñ Why is the task being done?

- Ñ Why is it important to have it completed?
- Ñ Explain relative importance of the task.
- Ñ Explain potential complications.
- Ñ Focus on the results to be achieved, not the process or method for achieving them.

Step Three

Confirm understanding. Instead of simply asking, “Do you understand?” ask them what they understand about the assignment and what questions they have.

Step Four

Clearly communicate the performance standards by which the team member will be evaluated. This ensures that the team member knows what good performance is.

There are three generic levels of performance standards:

- Ñ **Outstanding:** Completes assignments early and at a level that exceeds expectations
- Ñ **Acceptable:** Completes assignments on time and at a level that meets expectations
- Ñ **Minimal:** Completes assignments but they may be late or below expectations

Here are some guidelines for setting performance standards:

- Ñ What quality is required?
- Ñ What resources will they have? (Time, money, etc.)
- Ñ What specific results do you expect to see?

You need to decide ahead of time how you will measure performance and share that with the employee. Will you use observations? Survey? Interviews? Reports? Presentations? These measures should be simple, reliable, unbiased, organized, and directly related to the work being measured.

Step Five

Make sure the employee has enough authority to complete the task. Assigning a task without giving the employee the appropriate level of authority to do it to the level that you desire makes it unlikely that the task can be accomplished. Delegated authority lets the team member spend money, direct or seek assistance, or represent the department.

Common mistakes related to authority include:

- Ñ Not giving enough authority
- Ñ After the fact approval
- Ñ Accountability but not authority

Step Six

Communicate the level of support for the delegated task.

- Ñ What resources are available and who can help them with the task? Who can provide indirect help by suggesting other resources?
- Ñ What assistance can you provide? When will you be available to help? Be sure the employee knows what role you will be taking in this delegation and what they should come to you about.
- Ñ Give notice to others to inform them of the team member's role. This establishes credibility and gives everyone involved a clear understanding of their respective roles.

Step Seven

Obtain obligation and commitment from the employee for the delegated task. Don't leave an assignment with an employee unless you get a commitment for completion of the task by an agreed-upon date. Make clear the assignment belongs to the employee, and that he or she must resolve any problems that arise, or at the very least bring options for a solution when he or she comes to you with the problem.

Step Eight

Establish rewards and recognition. Be sure to notice the employee's performance. If recognition is never forthcoming, they will decide that good performance doesn't make any difference, and others will not be motivated to accept delegation either.

There are four types of consequences you can use:

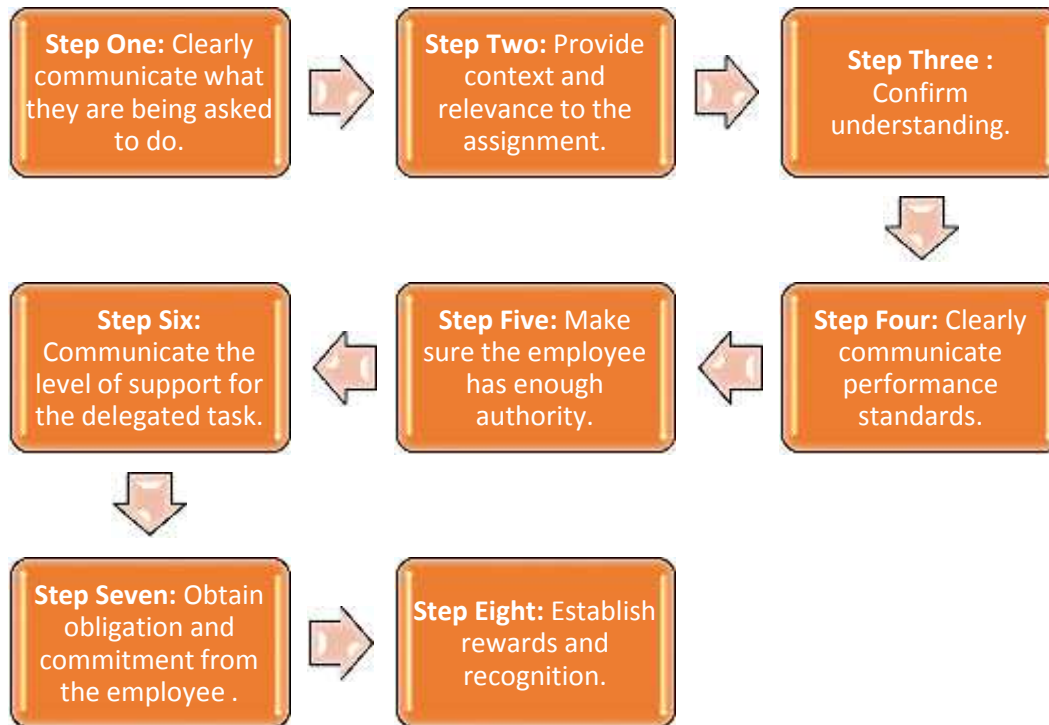
- Ñ Praise
- Ñ Redirection
- Ñ Re-negotiation of goals/standards
- Ñ Reprimand

Putting it into Practice

Case Study

You are going on a one-month cruise. You have been planning this trip for a long time and now it is time to delegate some of your workload to one of your staff members. Think about whom in your department is most capable of stepping in to fill your shoes for a month.

Steps for a Delegation Meeting



Giving Instructions

Three Types of Instructions

There are three basic types of instructions.

Orders

Orders are autocratic, and used for things which need to be completed immediately. **Some examples of orders:**

- Ñ "Stop that immediately."
- Ñ "Get me the Murphy file."
- Ñ "Ready, aim, fire!"

When should they be used?

- Ñ Where a quick response is desired or where there is no opportunity for prolonged discussion.
- Ñ When the person receiving the order knows exactly what has to be done, as there is no opportunity for clarification.

Other points about orders:

- Ñ Have an immediate effect
- Ñ Are followed exactly but almost never exceeded
- Ñ Require prior knowledge (I have to know where the Murphy file is, for example)
- Ñ Go unquestioned
- Ñ Are assumed to be right
- Ñ Allow no feedback
- Ñ Allow no initiative

Requests

Requests are used in general operation and on an everyday basis. Team development is encouraged through the opportunity to use initiative and express views and opinions. Requests are open to further suggestions even though the manager remains in control.

Some examples:

- Ñ “Would you pass the files, please?”
- Ñ “Can you complete this report by 5 p.m.?”
- Ñ “Would you make sure you are in your office and ready to start work by 8 a.m. every day?”

Other points about requests:

- Ñ Can take longer to be implemented
- Ñ Allow for feedback
- Ñ Allow initiative
- Ñ Promote individual development
- Ñ Can be exceeded
- Ñ Can attract criticism
- Ñ Can expose weaknesses

Suggestions

Suggestions are used where the team is allowed to develop on their own, with guidance from their manager. Suggestions aren't recommended for newly appointed or inexperienced supervisors, but they are useful to develop a self-motivated team and to assess individual potential.

An **example** of a suggestion: “We need to reorganize the filing cabinet so the files are compatible with the filing system on the computer.”

Monitoring Delegation

Your best efforts at delegating can fall short if progress isn't adequately monitored. It's also important to keep in mind that just because you have delegated tasks and given the individual the authority to get those tasks completed, you are ultimately responsible for the results of anything that you do delegate. You retain that responsibility as delegator.

Monitoring helps you catch problems as they arise and it helps motivate team members toward completing a task successfully. What do you consider when you are figuring out how much control or monitoring is necessary?

- Ñ The team member's experience and motivation
- Ñ Your working relationship
- Ñ Importance of task

How Do You Monitor?

Assignment Log

Identify milestones in the project or task and then develop a system for tracking what tasks are assigned to whom and when they are to be completed.

Personal Follow-Up

Informal methods of follow-up are very effective. An assignment you ask about frequently is more important than one you mention once but never monitor. Your interest must be sincere to be effective. Although it may appear time consuming, the fact that you take the time to ask tells the team member that completion is important. Remember that although you have delegated something, you are still ultimately responsible for it.

Sampling Techniques

Depending on the type of work, you may ask for a sample of the work to monitor quality. For example, you might look at a portion of a report or sit in on a meeting the employee is chairing.

Progress Reports

This is similar to an assignment log, except this time the onus is on the employee to include steps taken and difficulties in execution.

Management by Exception

This is based on the idea that controls are only needed when there is a deviation from set standards. In this way you focus on unacceptable problems rather than try to monitor everything. However, don't use this method if difficulties are hard to spot, a single error could be significant, or the employee is inexperienced at the task.

Practicing Delegation

Decision One

Your Role

You have been recently promoted to Manager of Operations at Fabulous Fireworks, a company devoted to creating and displaying futuristic fireworks displays.

This management position is new for you. Up until now, you primarily had technical responsibilities. You have performed so well in the technical role, however, that senior management (particularly the senior vice-president of the company) wants to reward you. She also feels you have the ability to take on this important management responsibility. You want the new responsibilities, although you aren't comfortable in your role yet.

As Manager of Operations you will be confronted with basic delegation functions like:

- Ñ Deciding what to delegate and to whom
- Ñ Delegating tasks
- Ñ Monitoring delegated tasks

As this story unfolds, you will find yourself in a variety of situations that call for different delegation decisions. You have a description of your employees to consider as you try to decide which one would be most suited for each situation. Each employee has the education and experience to do any of the jobs required of them, but as you will see, all have different styles and strengths. (In some cases, pronouns have been used, but each employee can be of either gender.)

You will be asked to reflect on how you would handle each situation. These scenarios will help you analyze your employees, identify some delegation challenges to overcome, and see some of the mistakes you might make. Take time to understand the environment, the people, and the circumstances presented. Place yourself in the position of the manager and try to imagine what you would do for each decision.

Your Employees

Pat

Pat is on the charities committee and the softball team. She is also trying to organize a card game for lunchtime players. Pat loves to be with people, to be doing things, and to be involved. Although Pat is not necessarily the life of the party, she does enjoy a good time. Pat excels in marketing and sales; everyone she meets feels like a potential friend. Pat tends to say whatever comes to mind, and then think about how it sounds. She may occasionally be heard saying, “Yes, I said it, but I didn’t mean it!”

Chris

Chris is also in sales and takes pride in a thorough knowledge of the product. Chris also has excellent troubleshooting abilities. Whenever there’s a problem, you can e-mail Chris for a quick solution. Chris prefers to do sales and troubleshooting work from the computer, which he feels is much more efficient. That way, Chris can meet with people from all over the world without having to move from the office. When Chris does take a lunch break, he can be seen with one of his two best friends in the office. Although Chris is friendly, gives generously to the charities campaign, and can be outspoken at times, Chris projects an, “I want to be alone,” image.

Sandy

Sandy has been called a number cruncher. She has been heard to say, “You can trust your eyes, ears, and sense of touch. Let me feel it and count it. I know what’s real that way!” Sandy is a manager whose hobby is collecting coins. She likes the shine and feel of the cool metal and the history they represent. Sandy also likes the look and speed of new computers and software, although change is hard to adapt to. Sandy notices when things are out of place in the office and likes to keep an accurate count of employees’ sick days and vacation days. Employees see Sandy as strict, a bit fussy on details, but fair.

Leslie

Leslie is the head of the marketing department and constantly amazes coworkers with creative ideas for the company’s products. Leslie’s work in graphic design has won several awards, although the marketing department’s budget doesn’t always balance. “That’s what accountants are for,” responds Leslie. The people who work for Leslie sense a commitment to them and appreciate how much freedom they’re given to work on their own. Leslie once said, “I just didn’t notice,” when someone at a meeting pointed out that her stockings didn’t match!

Lee

Lee started working for the company years ago as a clerk and is now administrative assistant to the Vice-President of Operations. Lee takes the job very seriously. He is constantly asked for advice from the younger support staff and helps them by relying on two pillars: tradition and the policy book. His motto is, “You’re either right or wrong, and it’s up to me to discover which!” Whenever a knotty problem arises, Lee thinks back on how the old founder would have responded, and then he consults the policy book. If there isn’t a policy, Lee initiates the procedures for implementing a new policy so that there

won't be any confusion the next time the issue comes up. Rain or shine, Lee makes sure that things are clearly defined and run fairly. "I have no favorites," Lee frequently claims. "Everyone knows exactly where I stand."

Terry

Terry, who prefers to make decisions by taking the human element into account, runs the human resource department. "Well, I don't really run it," Terry laughs. "It runs me, is more like it. Even though we have policies for human resources, you really have to use your heart. Just because someone's late a few times, you have to be understanding. Heck, they may have a sick kid or something! I really think Lee is a little rough on folks sometimes, but I understand that Lee feels that's his job." Terry has been in charge of human resources for ten years. The employees there have high morale and the department has had the lowest turnover in the company. Terry rarely misses a day, although she once had ulcer surgery after a small downsizing had to be managed.

C.R.

C.R. is the assistant to the sales team. She is well-organized, conscientious, and consistently exceeds standards. She uses a day planner and to-do lists and gets an enormous sense of satisfaction out of scratching things off when they are completed. C.R. schedules appointments for the sales crew and makes arrangements for periodic sales fairs that the company sponsors. Any written work is always neat, complete, and on time, every time. Her performance appraisals are a dream! C.R.'s biggest problem is that the sales force doesn't appreciate that work. C.R. has to get on their cases when they don't follow the schedules, or when they forget to do something that she has asked them to do. "They're children, really," C.R. often says.

Brooke

Brooke is one of the salespeople. He resents C.R.'s condescension. "Who says that life runs according to your schedule? Sometimes I have to wait for a client, sometimes we decide to go out for lunch. Not everything can be planned. Besides, it takes the fun out of life!" Indeed, Brooke's flexibility has been a great asset to the company as new technology has demanded changes in the products. Brooke outsells every other salesperson in the company, but is constantly late for meetings and cannot be pinned down for planning long-term goals. "Hey! We'll see how it looks when we get there!" Brooke replies with a wink.

Decision

Please check the appropriate column for each job. The "No" column means you believe you should do that job. The "Yes" column means you will delegate that task to a team member. You may need to help them but they will do most of the work themselves.

Delegate?		Activity
No	Yes	
		Prepare departmental budgets
		Monitor the budgets
		Prepare weekly report on each department for your direct managers
		Prepare an overall summary monthly report to the Board of Directors
		Respond to customer requests for information, demonstrations, etc.
		Respond to customer complaints
		Organize materials/purchasing for individual departments
		Capital purchasing for new projects
		Annual industry meetings with operations managers around the region
		Unanticipated and unusual technical problems
		Unanticipated personal problems that employees are experiencing
		Unanticipated business problems, such as a downturn in the market
		Head up a social committee for staff get-togethers
		Organize routine staff meetings to discuss issues arising during the week
		Weekly gathering of sales data from all sales team members

Decision Two

You have determined general guidelines as to what you are and are not going to delegate. Now it's time to decide which staff member would be the best person to actually delegate a particular job to.

Which one of your staff will you ask to head up the social committee? Why would you choose that person?

Which one of your staff would you ask to respond to customer requests for information, demonstrations, etc.? Why?

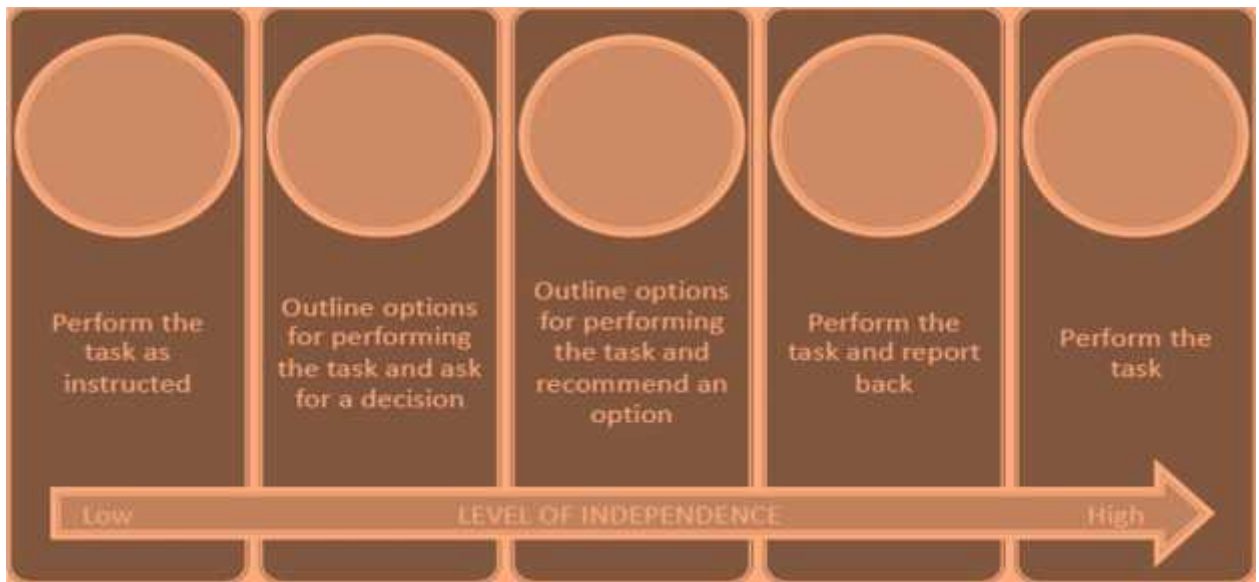
Which one of your staff would you ask to head up materials purchasing? Why?

Which one of your staff will you ask to chair routine staff meetings? Why?

Which one of your staff will you ask to ensure that weekly departmental reports are completed and in on time?

Decision Three

Now you need to decide what level of authority to give each employee in order for them to accomplish their tasks.



Social Committee

Customer Requests

Materials Purchasing

Chair Routine Staff Meetings

Prepare Weekly Departmental Reports

Decision Four

You have delegated to the recommended level of authority. Now it's time to decide how to monitor the delegation. Rate the following four methods from one (which you will use first) to four (which you will use last).

	Leave the employee alone until he/she tells you the job is done.
	Get feedback from other people (such as customers or coworkers) on the employee's progress.
	Frequently stop by the employee's desk for an informal discussion.
	Ask the employee to submit written status reports to you.

Decision Five

Let's say you didn't monitor one of the assigned tasks. You left the employee alone, assuming they were competent enough to complete the task on their own. To your dismay, things go awry.

How are you going to handle this? (Circle one.)

- Let it go and chalk it up to experience.

- Ñ Meet with the employee and discuss what went wrong.
- Ñ Let it go for now but mention the delay in the employee’s next performance appraisal.

Which one did you choose? Why?

Giving Feedback

The Ingredients of Good Feedback

When it comes to providing feedback, there are a few things to tell ourselves. First of all, feedback is a commentary on how you think someone is doing, and as such that feedback can include positive or negative observations, or both. Feedback that is heard and acted upon is what we would consider **effective feedback**. This sort of feedback is provided in a constructive manner.

Providing **constructive feedback** means that you are focused on providing feedback in a helpful manner, to help the other individual to learn and grow, not to insult, belittle, or punish them. (Sometimes actions do require some kind of negative consequence, too, but that is separate from this process.) Our objective in this course is to help you provide constructive feedback.

Our experience has shown us that some people do not like getting feedback at all. They may have had bad experiences with performance reviews or harshly judgmental parents or coaches growing up. Or, perhaps they are modest and not accustomed to receiving praise or speaking about themselves in front of others. Keep these potential anxieties in mind as you prepare to deliver feedback.

As well, feedback is supposed to be delivered honestly, but some of us are not very good about being honest. On the one hand, many workplace supervisors are concerned with being perceived as “fair and friendly.” Instead of being honest, they avoid delivering the truth in case the employee dislikes them for it.

On the other hand, we can be so honest with people that we are hurtful instead of being constructive. Another question to ask yourself is: can our desire to be honest release too much information and be hurtful instead of constructive?

Characteristics of Effective Feedback

In Private

Feedback should be given in private if your comments can be embarrassing, and a formal feedback meeting should always be held in private. While some people like the attention that comes from sincere praise or celebrating an accomplishment in front of others, some do not, and no one wants negativity shared in front of their peers. (This should be apparent without having to state it, but sometimes we get excited and forget!)

Balanced

Balance in this context is about designing the feedback session so that, even though there may be constructive criticism required, the employee does not feel attacked, or that all you have to say about his work is negative. We recommend that you avoid the older form of “sandwich approach” (by making a positive comment, a negative, and then a positive). However, you should still start any feedback with a positive comment about some aspect of the employee’s work. If you are not comfortable with this, or not good at small talk, write some comments down ahead of time to keep yourself focused. Your employee will appreciate that you get to the heart of the meeting quickly instead of letting any anxiety build. Feedback that is delivered in specific terms and in a sincere manner is usually accepted well, even when we are receiving criticism.

Relevant

Keep the conversation focused on feedback that is relevant and job related, and to things which the employee has control over. For example, complaining about the way a letter looks when the employee only has access to an ancient printer that adds lines to everything, or asking for a sophisticated looking brochure when there is no budget provided for the proper paper and licensed photography, only adds to the employee’s stress and frustration.

Specific

Avoid general statements when you deliver feedback. “You seem unmotivated,” is not nearly as helpful as, “You arrived late to work at least three days a week, your last two assignments were late, and you did not attend the new employee lunch last week.”

Documented

Base your comments on documentation, facts, and your own observation. Don’t rely on what another manager or a colleague told you, or what someone overheard, when you should be available to monitor what is going on yourself.

Personal (In the Right Way)

Compliments or criticisms that are directed generally toward the team are meaningless to an employee. “We just don’t seem able to get out error-free invoices,” is not as constructive as, “Three of the last invoices you sent out had errors in them.” Describe the behavior that is unsatisfactory, rather than judge a person because of it. Base it on their actions, and don’t make a personal attack on the individual.

Case Studies

Case Study 1

One of your employees in the maintenance department, Art Lebrun, seems to be having difficulty meeting some of his work assignments. According to standards that were set several years ago, all work orders are to be completed within 48 hours. However, he seems to spend a lot of time on the phone ordering supplies. You know this is a job that needs to be done, but you have a “just in time” policy for ordering supplies, as you have a really tight budget and no place to store supplies.

What will you do to handle this situation?

Case Study 2

Mrs. Stanfield is responsible for housekeeping for the entire facility. She and her two part-time staff get through a tremendous volume of work. She prides herself on a high level of cleanliness throughout the building, and is always cheerful and ready to stop and help others. Every time you pass her in the hall, you tell yourself you should stop and tell her she is one of the reasons the facility has such a good reputation for quality. But you are always late for a meeting when you run into her, and the moment passes. Over the last two weeks she has been looking a little worn and she seems to have been making more mistakes than usual.

What do you need to do?

Case Study 3

Four months have now passed since you sat down with each staff member and established performance expectations and a support plan for each of them. You have finally found a few minutes to update files. You come to Yvonne Dresser's file. Yvonne is responsible for managing your computer systems. Her objective at the outset was to improve her own ability to meet deadlines by delegating more. You know she has made an effort. She has taken the course on delegating that you recommended, and she has been delegating some of the more routine software support work to her two staff. But you know these two people complain about not knowing what they are supposed to be doing and whether what they are doing is the right thing.

What do you need to do?

Becoming a Good Delegator

Characteristics of Effective Delegators

There are five key characteristics of effective delegators.

Receptiveness

Effective delegators are open to suggestions and are willing to give other people's ideas a chance. They allow employees to think creatively.

Willingness to Let Go

Delegators are not afraid to give decision-making power to subordinates. They trust workers to do their job in the best way they can without constant supervision.

Willingness to Let Others Make Mistakes

Delegators are patient with workers and think of them as human beings. Although they expect some mistakes, they do not hover over workers like anxious hens.

Willingness to Trust Team Members

Delegators know that if they can't trust their team members, delegating isn't going to work. They work to build their team members' skills and trust.

Excellent Communication Techniques

Delegators stay in touch, keep the communication lines open, and are available when subordinates need help. However, they resist the temptation to take the job back to complete it personally.

Further Reading:

- ✓ *Bellman, Geoffrey. Getting Things Done When You Are Not in Charge. Berrett-Koehler Publishers, 2001.*
- ✓ *Finch, Lloyd, and Robert Maddux. Delegation Skills for Leaders, Third Edition. Axzo Press, 2005.*
- ✓ *Gennett, Donna M. If You Want It Done Right, You Don't Have to Do It Yourself! Quill Driver Books, 2003.*