



Unit 2

Monitoring Delegation

Staff Training Solutions

Learning Outcomes

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

- ✓ Give better instructions for better delegation results
- ✓ Recognize common delegation pitfalls and how to avoid them
- ✓ Monitor delegation results
- ✓ Give effective feedback

Unit 2

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?

- The team member's experience and motivation
- Your working relationship
- 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:

- Deciding what to delegate and to whom
- Delegating tasks
- 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?		
No	Yes	Activity
		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?

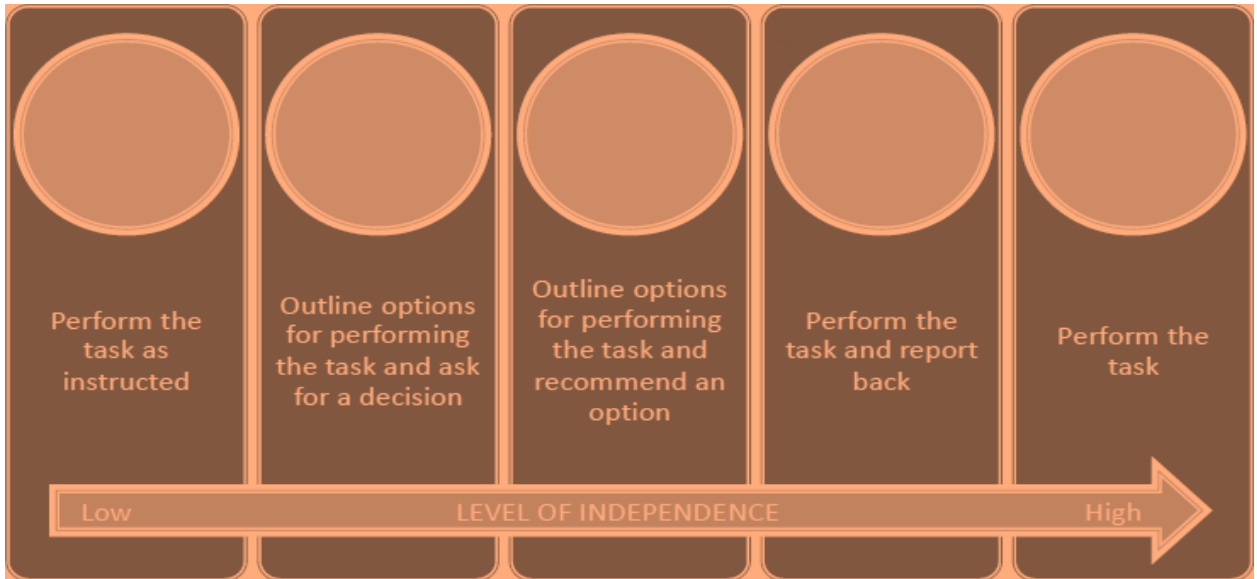
Which one of your staff would you ask to head up materials purchasing? Why?

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.
- Meet with the employee and discuss what went wrong.
- 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?

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:

- ✓ *Hamilton, Cheryl, and Cordell Parker. Communicating for Results. Wadsworth Publishing, 2007.*
- ✓ *Senge, Peter. The Fifth Discipline. Currency, 2006.*
- ✓ *—. The Fifth Discipline Fieldbook. Crown Business, 1994.*
- ✓ *Williams, Debi. The Greatest Leaders Do the Least. Tesla Press, 2011.*

