<div align="center">**Delegate to Motivate - Flip Charts**</div>

[In this "Socratic" style program, we asked participants to answer questions and recorded their flip chart responses. The trainer added only if substantial points were missing.[

Strategies and Challenges
- Strategies
    - Being timely
    - Planning in advance
    - Communicating x4
    - Matching tasks with skills
    - Investigating skill sets and using them to your advantage x2
    - Clarifying
- Challenges
    - Providing clarity in expectations and reception of delegations
    - Communicating x3
    - Finding time to invest in the delegation process x2
    - Motivating operators effectively x2
    - Knowing the risk around learning
    - "Letting go" x2
    - Trusting your staff x2

What is Delegation?
- Assigning and clearly defining tasks
- Retaining responsibility
- Planning/developing a strategy

What are the Benefits?
- Allows for greater productivity
- More time to focus on higher level tasks
- Develops a stronger team
- Grows the people
- Increases confidence

What are the Risks?
- Tasks could have a connection with fairness and/or status
- Staff may be resistant to learn
- Burning out best people
- Work may not be done well, or at all
- Possible losses to the company

What are the Phases of Delegation?
- Evaluation

- ○ Work analysis
- ○ Deadlines and timelines are secured
- ○ Resources in place
- Selecting the "Who"
  - ○ Handover
    - ■ Handoff process
    - ■ Support
    - ■ Check-ins
    - ■ Monitoring
- Work completed
  - ○ Debrief
  - ○ End: evaluation

Evaluation
- Tasks
  - ○ Which tasks can be delegated?
    - ■ Easy, quick, stretch, or development
    - ■ Uncritical tasks
    - ■ Requires small amount of training
- People
  - ○ How do you find out what your staff can do? (Now and over time)
    - ■ Experiment
    - ■ Time and experience
    - ■ Find out what they are asking for
    - ■ Assign a small piece of a project for them to do as a trial
    - ■ Assess strengths by asking
- Matching tasks with people
  - ○ Availability
  - ○ Current workload
  - ○ Novelty
  - ○ Challenge
  - ○ Life circumstances

Handover
- What will you need to do and think about to get ready to hand over the task?
  - ○ A background document
  - ○ Broad brushstroke sketch
  - ○ Materials to other resources
    - ■ Vendors
    - ■ Security access
    - ■ Data

- ○ Autonomy
  - ■ Timeline/Milestones
  - ■ Define reporting and communication frequency
  - ■ Clarify the level of support you will provide
- What should happen in the handover meeting?
  - ○ Clear definition of the tasks
  - ○ Timeline
  - ○ Provide tools
  - ○ Communicate Confidence
  - ○ Briefing
  - ○ Explain the purpose of tasks
  - ○ Beware: death by meeting
  - ○ Confirm understanding
  - ○ Clear next step

Support
- What should you do to support your employee after the handover?
  - ○ Explain your open door policy
  - ○ Have credibility as a supportive individual (make sure your actions support your words)
  - ○ Be even keeled
  - ○ Be humane and empathetic
  - ○ Maintain expertise
  - ○ Lead by example
  - ○ Offer reward questions
  - ○ Extend support
  - ○ Check in on progress
  - ○ Communicate: relay info
  - ○ Be aware of the environment and continually adapt to it
  - ○ Abide by agreements
    - ■ Especially the ones in regards to autonomy

Debrief
- What should you do with your employee after the task has been completed?
  - ○ Review
    - ■ Ask how things went
      - ● What would they have done differently if they were to do it again?
      - ● Was it easy? Challenging?
  - ○ Find out if there is anything left to do or follow up with
  - ○ Compare results to defined outcomes
  - ○ Analyze the positives and negatives of the assignment

- Create a supportive learning framework
- Lessons learned document
- Provide recognition