

How to Effectively Delegate for Development | 122

Welcome to Lean Leadership for Ops Managers, the podcast for leaders in Ops Management who want to spark improvement, foster engagement, and boost problem solving - AND still get their day job done. Here's your host, Leadership Trainer, Lean Enthusiast, and Spy Thriller Junkie, Jamie V. Parker.

[00:00:29] Hey, ops executives, I have some exciting news for you. Really? For all of our podcast listeners. So stay tuned and I'm going to share that news at the end of this episode. For now, here's the question How might operations leaders delegate more effectively?

That's what we're digging into today as we continue this conversation on delegation and development. Now, back in episode 120, back on August 2nd, 2023, we talked about obstacles to delegation, the things that hold operations leaders back from delegating. Then in episode 121, we talked about the real reasons why operations leaders should delegate.

In other words, why should they muster the courage and skills to move past those obstacles and delegate anyways? And now in today's episode, we're continuing that conversation further and specifically how the reason we delegate what we talked about in the last episode, how that can drive to more effective delegation. So to help with this process, I put together a delegation planning worksheet that you can use to help prepare for effective delegation, and you can download that worksheet.

It's free. You don't even have to give me your email address, right? None of that business. You just download the worksheet directly at our show notes and you can find our show notes at Process Plus Results.com Forward slash podcast. This is episode number one 2122, and it was released on August 30th. So August 30th, 2023. Episode number 122. Show notes at process plus results.com/podcast.

[00:02:07] And there you're going to find a link to download our delegation planning worksheet. And I'm telling you this because that's what I'm going to walk you through here in this episode today. You don't have to have it. You can just listen and follow along. But if you want to see the visual, that's where you can get it. So here's the question we're starting with today. How might operations leaders delegate more effectively?

And my primary answer is to plan like there's some stuff around communication and clarity and all that kind of stuff. But really the crux of it, the foundation of it, is the planning. When we spend a little bit of time

How to Effectively Delegate for Development | 122

planning, right, or setting an intention or being thoughtful or deliberate about what, why and how we're delegating, then we are able to do it more effectively. So this is why we're giving you this worksheet. Now, the first section of the worksheet is the primary reason for delegating.

Remember, in our last discussion in the last episode, we talked about the reasons for delegating, and your reasons tie directly into how you delegate effectively. If you go to the Google and you search things like how to delegate the steps, almost always like the search results are always going to give you a set of steps and steps, and they almost always start with you as the leader taking some sort of inventory of the tasks, activities or areas of responsibility that you own, and then sorting those out to identify which activities you want to delegate.

[00:03:30] Now here at process plus results, we believe that's one way to do it, but it's not always the best way to do it. You see this first step when we take this first step this way, it assumes that the reason I'm delegating is centered on me as the leader. What are my activities, what are my areas of responsibilities?

And then making my selection, having thought primarily about me. But back in the last episode, we shared that delegating to free up my bandwidth is only one of the real reasons we delegate. We also talked about other real reasons to delegate, and those could be for the benefit of the individual and also for the benefit of the organization or the team.

So let's say just as an example, that your primary reason for delegating in this instance is to develop your the plant managers on your team. Right? If that's the case, you don't start with your list of activities. Instead, you start with the individual plant manager that you're developing through delegation. You're going to start with that person, not with yourself. That's why in our delegation planning worksheet, the very first thing you consider is your primary reason for delegating. So once you have that, then you're going to consider the next three topics, the next three sections on the worksheet.

[00:04:49] But these next three sections do not necessarily have to go in sequential order. You just want to do the next three. So the next three sections are who is the individual, What is the activity or area of responsibility and what are the skills or the competencies. So individual activity and skills. So let's say you have a primary reason, then you go to this next section. Now sometimes the next section that you fill out

How to Effectively Delegate for Development | 122

is the individual. Like when your primary reason is to develop your plant managers and the example we just give, the next thing you're going to say is, okay, who am I starting with?

Which plant manager my thinking about? And I put in with the individual. Sometimes after you do, the reason the next section you fill out is the activity. Like when our primary reason is to free up our bandwidth so that we can focus on strategic imperatives. Then we say, okay, which activity am I looking to delegate? And so that was what we would do next. Sometimes when we do our primary reason, the next section you fill out is the skills or the competencies, like when our primary reason is to improve our teams flexibility or independence.

And we need to build up specific skill sets or competencies amongst our operations leadership team. So different scenarios will have you starting at different points in regardless of where you start or what sequence you go in the sections.

[00:06:04] You just want to fill out each each of the sections. The individual Who specifically are you delegating to the activity? What specifically is the activity, the task or the area of responsibility you're delegating and the skills? What specifically are the skills or competencies the individual will need to have or to improve to perform this delegated responsibility?

Okay, so step one was the primary reason, right? What's the primary reason why? And step two is a series of three sections that help you gain clarity on the individual, the activity and the skills. So now we have a basic understanding of what we're trying to do here, right from a delegation standpoint. And step three, you're now going to define the level of delegation. So there are several different levels of delegation you can use or kind of scales, if you will.

What we're essentially talking about is what's the level of authority that you're giving to start off with. So in this I'm going to give you one example here with the five levels of delegation, and this, I think is attributed to Michael Hyatt. It's all over the place and it's hard to find exactly where it started. I think it maybe started with Michael Hyatt, but I could be wrong there. But. These these five five levels of delegation that I'm about to walk you through.

How to Effectively Delegate for Development | 122

[00:07:24] What you're thinking about when you do this worksheet is where are you going to start as you do more delegation, as the person skills grow and they get more experience, it can you can change the level, but you always want to know where you're going to start off at. So in this example, the five levels of delegation, there are five main levels, one being the least amount of authority and five being the most amount of authority or kind of autonomy, if you will.

So level one is do as I say, this is essentially task delegation where standard work is defined and you're just executing right there. The team member is just executing. So level one, do as I say, level two research and report a level two. They're researching the decision or the problem or the action that needs to be taken and then reporting the options.

And this is kind of like a third party objective standpoint of reporting the facts or the options or the possibility is but not yet recommending or advocating for one or the other. You can kind of sound like, let's say we have an upset customer situation. We can say, here are the facts I've uncovered. I think there are three possible next steps. The pros and cons of each one are right, So they're kind of just evaluating, not even evaluating, but investigating level three.

[00:08:39] So level two is research and report. Level three then becomes research and recommend. So this is similar to level two, except now it adds on a recommendation. So we say the you know, here are the three possible next steps. The pros and cons of each are. I recommend that we do this step because of right. So that's level three research and recommend level four decide and inform.

This is more than a recommendation at this point. The person you're delegating to, they have the authority to make the decision and and they're just informing you as the leader before the action is taken. This keeps you in the loop, like, okay. Have I keep you in the loop? Want you to know this is how I'm going to handle it. This is what I'm going to do.

In this level for decide and inform you as the leader still have the opportunity to stop the action if you expect there to be detrimental negative effects because the information, the informing they're telling you before they actually take the action or before they execute the decision. But at this level of delegated authority, you're often going to allow the individual to learn through whatever decision they've made. So if

How to Effectively Delegate for Development | 122

it's not a major negative impact, you know, and you're still like, Yeah, I don't know, you're probably still going to let them learn through that.

[00:09:56] So level four decided in form and then level five act independently. And at level five, you have delegated full responsibility, accountability and authority. So to summarize these level one, do as I say, level two research and report level three research and recommend level four Decide and inform and level five act independently.

Now, each delegation experience is going to be unique. The point of having this in the planning worksheet is to decide in advance intentionally what level are you starting at? That way, when you communicate this delegation, when you engage the individual in it, you can explain your expectations for authority, right? Whether you label it that way and you say, hey, this is going to be a level three, or whether you just explain what the authority levels are.

Now, keep in mind, the same individual with that same activity will likely move up the levels of delegation as their skills improve and they gain more experience. And sometimes you're starting off right at level five from the very beginning. You don't have to climb the ladder from the from the bottom every single time. Right now, these levels, the way that these levels are designed is they're focused on decisions.

You can modify them to focus more action based task activities by defining how much autonomy you want them to have. At what point do they show your your their work for your review? At what point do they need someone else to review and approve? Now, I did want to also mention another model that's kind of similar just to get your brains thinking about this.

[00:11:27] And this is the ladder of leadership levels by David Marquet. So David and I both were keynotes at a leadership retreat for a company, and I was able to hear him explain and demonstrate these levels. And so think of this model, this ladder of leadership model as the individual that you're leading, how they position, how much authority and empowerment they're using and how they communicate to that to you.

So it's going to make a little bit more sense as I go. So here there are seven levels. Again, level one is the

How to Effectively Delegate for Development | 122

lowest amount of autonomy or authority. Level seven is kind of the highest amount of autonomy. So level one, tell me what to do. Hey, tell me what to do. Right? That sounds a lot like level one of the other model, which is do as I say, right? Do what I say. So level one, tell me what to do. Level two is I see. So this is where I share my observations instead of keeping them to myself. Here's what I see is happening. Level three is I think so now I'm telling you my conclusion or my recommendation, right? So again, this is very similar to level one, two and three of what we already heard before.

[00:12:38] Level four is I would like to so now I'm kind of asking for permission to do or decide something specific. So level one, tell me what to do. Level two. I see here are the facts. Here are the options. Here's what I'm seeing. Level three is I think here's my recommendation. Level four is I would like to hear specifically what I want to do. Here's the action or the decision that I want to do.

And I would like to, but I'm kind of getting that permission now. Level five, this is where it gets into some nuances here is I intend to Now this is advanced awareness. It's similar to level four delegation decide and inform where I'm making the decision or taking the action, but I'm just giving you that advanced notice so that if it's a major issue, you have a chance to redirect.

And a lot of Mark's work explores leadership and culture at this level. Like this intentional like I intend to. And the reason he has this language, this communication model and this language is because it's different from I would like to I would like to is still putting you as the leader, as the decision maker. Hey, I would like to, but I'm asking you for permission. Level five. That nuance is I intend to. Hey, heads up. Here's what I intend to do.

[00:13:50] Right. And you can hear that difference. Now, the next two levels are level six and level seven. Level six is I've done. I'm telling you what I just did. Hey, this is what I did. Level seven is I've been doing. So this is different than I've done because it's not just us kind of one time thing or this thing I just did. This is something that I have been doing. There's this pattern of this now, obviously, these ladder, this ladder of leadership is not specifically designed for delegation planning, but the idea of empowerment and authority and development is similar. Right.

So level one, tell me what to do. Level two, I see Level three. I think level four, I would like to level five. I

How to Effectively Delegate for Development | 122

intend to level six I've done and level seven I've been doing. So this is more about the kind of the communication and the empowerment between the leader and the team member. But when you think about planning for delegation, I encourage you to use something like this. Whether you use the five levels of delegation, whether you use David Mark's ladder of leadership levels, whether you have something else that you use or you create your own.

The point is that you actually need to decide where you want to start. What specifically is the level of authority or empowerment are you giving to this person or are you creating in this situation where they are learning new skills because it's not going to be full authority every single time? So you want to be able to communicate that to them.

[00:15:22] And if you don't plan for it, if you don't know in advance, if you don't think about this in advance, then you're not able to clearly communicate and then you're not on the same page with the individual. So this is why kind of step three on this worksheet after we've kind of figured out what we're doing is what's the level of delegation, what's the level of authority, What's the level of empowerment? Okay.

So once you've established the reason, the individual, the activity, the skills and the level of delegation, now you're ready to get into some of the logistics. So step four, the bottom row of the planning document has five sections. The desired outcome or the success measures, the timeline, the resources or constraints, the reporting requirements and the coaching cadence.

So these are pretty simple, but it's just going to give you a chance to think in advance about what this looks like. So first you define what's the desired outcome or what's the success measures. Then you establish the timeline. Is it something that's going to be done today? Is it weekly by 3 p.m. Fridays? Is it a project that you have four weeks to complete? What's the timeline? Then we have resources and constraints.

[00:16:34] What are the resources that are available to them? What constraints might they have to overcome or need to be aware of that so that they know what constraints they're working within? Like you may have a budget constraint or a constraint of which parts of the process can be changed versus which

How to Effectively Delegate for Development | 122

they can't. Then you have reporting requirements.

What information do they need to report on what frequency and what medium? So do they send you a weekly recap via email? Are there milestone points that you need to have an update? Is there data that they need to give to another team member or they need to report out in a daily meeting? Is there a report that has to be prepared that goes along with this area of responsibility? What is it that can look very different for different activities and areas of responsibility? And then finally, what is the coaching cadence? How will you give feedback when how often are you doing daily coaching for 15 minutes? Or is it once a week during your pre-scheduled one on one? Or are you going to meet once monthly for a strategy session?

I don't know what that's going to be for your for your specific scenario. The idea, though, is that you want to think about that in advance. You want to plan for it in advance. So completing this delegation preparation creates more clarity for you, and then you can use it as the basis for communicating with the individual.

[00:17:59] So it also creates more clarity for them. And when you are clear and the individual is clear and you're both on the same page, your delegation will be more effective. In fact, you can even co-create this preparation document with the team member directly talk about developing through delegation. So this worksheet that I just walked through, you can download it. It's at processplusresults.com/podcast. This is episode number 122.

Main thing I want you to think about is a lot of times we kind of like dump and run, right? You know, like, I get it, we're busy, we got a lot going on. And so we say, Hey, I need you to do this. And we give the activity, but we don't really do much else beyond that. And sometimes you're doing small tasks and that's fine, right? Because it's just kind of task assignment and not really delegation. But when you're thinking about delegation, particularly delegation for development, you want to be a little bit more intentional.

And if you want to improve the effectiveness of your delegation, then doing some of this initial thought work of deciding what's the reason and what are the skills and what are the success measures, Deciding

How to Effectively Delegate for Development | 122

some of that in advance will help your operations leaders be more effective as they are developing their teams through delegation.

[00:19:22] All right. What about you? What did you hear today that most resonates? Where do you have a different perspective? You might want to explore those areas and even engage your leadership team in dialog about how to delegate for development more effectively. Now, before we wrap up, I told you at the beginning of this episode that I have some big news and I can't share all of it and all the details right now.

But what I want to tell you is that you definitely want to tune in to our episodes in the September October timeframe. Next week, I am heading out to a Lean Mindset for executives event. It's going to be a live streamed and on LinkedIn and all of that. So once I have more details, I will send it out to you. I'll let you know how you can watch some of the things.

But the in-person event is an invite only and it's for executives and a couple of my Lean thinking friends and authors are going and we are going to go so that we can bring you speaker insights, executive attendee insights, and our own reflections on what we hear. So I can't really say more than that right now, but I want you to keep an eye out on your emails and be sure to subscribe to this podcast on whichever podcast platform you most prefer. All right. That's it for now. Until next time.