



**Mastering the Art of Delegation:
Using the Power of Other People
2015 NALP Conference
April 23, 2015**

Presented by Lisa Montanaro, JD, CPO®
*Productivity Consultant, Success Coach,
Business Strategist, Speaker, Author*
www.LisaMontanaro.com

✓ Overview

One of the surest ways to become overwhelmed is to try to do everything yourself in the workplace. In order to grow and be more efficient and successful, you must learn to delegate. Mastering the art of delegation is the idea of utilizing the knowledge, strengths, creativity and ingenuity of all the people in an organization toward creating continuous improvement in the workplace. This workshop helps attendees learn to identify what tasks and responsibilities to let go of, who to delegate to (hint: you can delegate to almost anyone, including yourself!), how to effectively delegate, and the tools to keep track of the path of delegation.

✓ Goals of this Session

Know

How failing to delegate may be holding you back
How to assess your delegation style, systems and people
What you need to do to get started and make progress

Do

Create a Delegation Action Plan
Use delegation techniques in your professional life (and perhaps your personal life too!)
Tailor the process to match your own unique style, habits & behavior

Feel

Less overwhelmed
Empowered to take action
Confident that you can start delegating

Of course... it's up to you, but you've taken the first step by being here!

Shifting your mindset is a great start, but action must follow. So be open to turning up your Action Volume after you leave here.



Roadmap

- Obstacles & Benefits of Delegation
- Style - Productivity Style, Learning Style, Communication Style
- Systems - Proper Tools to Delegate Effectively
- People - Who to Delegate To
- Effective Delegation
- Putting it All Together

Obstacles & Benefits

Obstacles to Delegation

- Control Freak Syndrome (CFS)
- Issues of Trust & Control
- Failure to Create Systems
- Too Busy Working
- Not Making Time to Delegate - Effective delegation requires sacrificing time in the short-run in order to accomplish long-term goals.
- Lack of Affordability/Failure to Invest

Cost-Benefit Analysis of Not Delegating

- Losing out on the opportunity to mentor someone else and teach them a valuable task or skill - leadership/mentorship.
- Wasting time lost to non-essential functions and areas that do not fall within your Unique Areas of Brilliance.
- Loss of money if you are not the best person to be doing a particular task or if you are inefficient. Delegation also includes setting up systems to streamline processes and tasks.

Delegate Before You NEED To

- Delegate and outsource earlier than you think you need to or have to.
- By the time you desperately need to and have to delegate, you are usually too overwhelmed. You're probably doing way too much yourself!
- While you may like to think it, you are not super man (or woman). You are, however, the creator of your own success. And not many success stories were mastered by doing everything yourself.

Don't Go It Alone

- In my mind, one of the sure fire ways of creating a thriving professional and personal life is to become a master delegator!
- While it's really important to understand all facets of your work, there is no reason why you need to continue trying to do them all yourself once you've figured out which ones you are the best at. So long as you have a grasp of what's involved in each area, you



really should be stepping back and assigning those non-critical but still important tasks to others.

- Let Go to Grow!

Style

Style = Productivity Style, Learning Style, Communication Style

Best delegators are people who are aware of their own productivity and work styles, and are respectful of other's different productivity and work styles.

Self-Assessment

- Learning Style
 - Visual, Auditory, Kinesthetic, Tactile
- Dominant Brain Type
 - Right Brain vs. Left Brain
 - Right Brain dominant people tend to be more creative and use associative thinking.
 - Left Brain dominant people tend to use more linear focused thinking.
- Organizing or Productivity Style
 - Tolerance for Clutter
 - Innie or Outie (not talking about belly buttons!)
- Communication Style
 - Technology
 - Comfort level and knowledge of various technology tools
 - Preferences: phone, email, text, project management software, shared calendar, etc.
- Accessibility
 - How to communicate?
 - How often to communicate?

Systems

Systems = Proper Tools to Delegate Effectively

Are you holding onto too many tasks that you know you could be delegating, but don't have the infrastructure in place to effectively delegate without taking up too much of your precious time?

Create Systems to Ensure Success

- Set up systems that are easy to follow and deliver results.
- Most workplaces are lacking in systems.
- Develop systems so that the organization can run more smoothly.
- Provides structure and clarity.
- Helpful when things get busy and you are overwhelmed.



Effective Systems

- System must make sense to you and any other users - multi-user system.
- System should be simple.
- System should be low maintenance.
- System should build on your strengths.
- System should get the results you want.
- System should be accessible.

Examples of Systems

- Operations Manual - Create for your organization, division, department or team. Or even for a specific project if large enough.
- Project Log - Create on individual basis but also share with select team members.
- Delegation Log - Tracks delegation process in detail.
- Technology/Software/Applications
- Templates - Create Master Lists, Forms and Templates
- Shared Calendar - Fosters communication

Operations Manual

- Passwords to online and offline accounts
- Business supplies with purchasing/ordering information
- List of key documents
- Sample email templates
- List of all team members and their contact information
- Procedures for hiring new team members and training them
- Blue print or check list of all processes for delivery of services to clients

Project Log

- Consider creating a Project Log organized by category for work.
- Project name, type of work, due date, etc.
- Vital tool for keeping on top of work and deadlines, sharing your progress with colleagues and supervisors, and for prioritizing your assignments.
- This is also where you can record tasks that have been delegated to co-workers.

Delegation Log

- Create a form to track assignments delegated to others.
- Name of person, task or assignment delegated, date delegated, date due, date completed.

Streamlining Tasks

- Create master lists, forms, and templates.
- Use technology to your advantage
 - Shared calendar
 - Shared project or task management system (Asana, Trello, etc.)



People

People = Who to delegate to

Trust and Control Issues

- Can delegate to an expert, an equal or a beginner depending on task.
- Ask: Can someone else do it better than you, faster than you, or good enough?
- "Slow to hire, quick to fire." Common employment law phrase about hiring employees. Applies to delegation also. Slow to delegate, quick to respond.
- Can delegate to yourself and the organization/department by setting up the systems we discussed earlier.

Delegation for Leaders

- As a manager or leader, you have a responsibility to get work done through others rather than doing it all yourself.
- Effective delegation involves much more than assigning work. It requires developing new skills, and demands a shift in your attitudes and values.

Mentoring Aspect of Delegation

- Delegation can be an effective way to mentor someone else and teach them vital skills in the workplace. It can be part of your role as a leader.
- The mentee benefits by learning new skills and taking on more responsibility.
- The mentor benefits by being able to teach someone, supervise them, and provide coaching and feedback.

Accountability Aspect of Delegation

- Being accountable to someone else can be a very effective way to overcome procrastination.
- Collaborate by working with someone else to get the task or activity started and finished faster. Two minds (or pairs of hands) can be better than one!
- Assemble a team, have someone do the parts of the task or activity that you don't like or are not good at, give the task or activity away altogether by delegating it.

Effective Delegation

Effective Delegation

- Present the job clearly and set a deadline for completion.
- Be available while the job is being done for questions.
- Review and evaluate the end product.

The Path of Delegation

- Discuss
- Demonstrate
- Do it Together
- Do it Alone
- Inspect
- Delegate



Common Mistakes in Delegation

- Your co-workers can become very frustrated, and often defensive, when you try to teach them to do something while using inappropriate and ineffective delegation skills.
- When this happens, you probably get frustrated because the staff member does not understand how to carry out the task effectively. The staff member becomes frustrated because he or she is trying to learn to do the task but is not achieving it adequately.
- Solid training and staff development methods can do a lot to enhance productivity and reduce frustration and tension in your department, division, or overall organization.
- First, you must commit yourself to **eliminating the four most common errors** leaders exhibit when training and coaching others:
 - Failure to establish and clearly communicate the learning objectives.
 - Failure to outline the entire set of learning tasks.
 - Failure to follow-up with affirmative and corrective feedback and reinforcement.
 - Failure to establish deadlines for mastering the task.

The Art of the Counter Offer

- Focus on results, not excuses, if you cannot meet an assignment or task that is being delegated to you.
- Counter Offer: Say what you can do, not what you can't
- When you know you will not be able to meet a deadline at work, don't say, "I'm sorry, I can't do it by Friday, as I have to ..."
- "Instead, reply, "I'll be able to do the assignment by Monday. How does that work?"
- No apologies, no explanations -- just a statement of what you can do.
- Sometimes your resolution is fine, but you have to offer it up to see if it will be acceptable.

Putting it All Together

Delegation Exercise: Your Unique Areas of Brilliance

- Think of the role you hold right now in the workplace.
- Make a list of all of the activities that occupy your time for this role.
- Select those that use your unique strengths, that you love to do, and that only you can do. These fall within your areas of Unique Brilliance. That list should be short compared to the "Everything Else" list.
- The activities on the "Everything Else" list are the ones that can and should be delegated.
- Practice delegating one of the activities or responsibilities on the "Everything Else" list using the skills we covered above.



Unique Areas of Brilliance

Everything Else

Delegation Action Plan

- Which techniques or mindset shifts do you plan to “try on” to see how they feel and if they work for you? When?
- Which technique will you implement first? When?
- What changes, tools, and systems do you need to put in place to better manage your time?

Reinforcement

- If you want to reinforce your learning and continue what we started today, sign up for my free online newsletter/ezone, which includes valuable tips, articles, and advice on a monthly basis.
- Plus you get an awesome digital toolkit to help you be more purposeful, passionate and productive in life and work. It includes 2 audio programs and an ebook. Claim your free digital toolkit at www.LisaMontanaro.com/toolkit.
- And if you are interested in my coaching, consulting or speaking services, let's set up a call so we can discuss your needs and see if I am able to help you or your organization.



About Your Presenter

Lisa Montanaro



Lisa Montanaro is President of Lisa Montanaro Global Enterprises, LLC, founded in 2002, which offers productivity consulting, success coaching, business strategizing, and speaking services to individuals and organizations. Her online learning platform, www.LMGUniversity.com, provides courses to improve people's lives, businesses, and careers.

Lisa has a unique background, having traveled the path of a performer who didn't want to be a "starving actress" so said no to Broadway, worked as an instructor and interpreter of the Deaf to put herself through law school, and became a lawyer specializing in employment law for 9 years. She then "defected" from the practice of law and started her business on the heels of the 9-11 tragedy.

She is a member of the National Speakers Association, and delivers keynote addresses and workshops on productivity, peak performance, life-work balance, branding, entrepreneurship, public speaking, and career development to corporations, associations, law firms and law schools. She also provides individual coaching and organizational consulting to clients world wide.

Lisa received her BA in psychology, speech and political science from Hofstra University, and her JD, magna cum laude, from Pace University School of Law. She has completed numerous advanced training and certification programs in mediation, career counseling, organization and productivity, life coaching, public speaking, entrepreneurship, and business development.

Lisa is dedicated to fulfilling her purpose of helping people live successful and passionate lives and enjoy productive and profitable businesses and careers. To find out more about Lisa's speaking, coaching and consulting programs, as well as her books and multi-media products, visit www.LisaMontanaro.com.

Lisa Montanaro Global Enterprises, LLC
 (530) 564-4181
Lisa@LisaMontanaro.com (email)
www.LisaMontanaro.com (website & blog)
[@LisaMontanaro](https://twitter.com/LisaMontanaro) (Twitter)
[www.Facebook.com/LisaMontanaroBiz](https://www.facebook.com/LisaMontanaroBiz) (Facebook)
[www.Linkedin.com/in/LisaMontanaro](https://www.linkedin.com/in/LisaMontanaro) (LinkedIn)
www.YouTube.com/LisaMontanaro (You Tube)

