

This is a real example of the Plan Before You Delegate worksheet:

The BWLC team used this to plan for delegating the facilitator role of the Delegation Workshops to the selected dream team members.

Using this form is designed to get you thinking more broadly about an issue so you can make better decisions.

For a very simple situation it might look like over-kill to you, but as a learning tool it can be very effective.

It is also best to experience it using a complex delegation where many factors can be important and or in conflict which is often the case with a significant delegation.

Plan Before You Delegate

Select the Task

1. What do you want?

- Using Facilitated Small group workshops, provide participants with knowledge and skill to delegate effectively.

2. Why is this important?

- Advance the Thrive initiatives selected for Chris Organization focus
- For participants ... small groups provide good learning opportunity
- Form or strengthen relationships across the business, roles and geography
- Give participants tangible examples, practice, and observation of others
- Participants get new insights / learning about themselves and delegation
- Growth opportunities for the selected facilitators

3. Why don't you already have it?

- Newly identified skill requirement

4. When do you want it?

- Over Period Jan 1 – Jan 31

5. How will you know that you have it?

- Workshops held, people attended/engaged, results reported
- Participants and Facilitators excited about their learning
- Facilitators identified speakers for January workshop
- People want to meet again

6. Therefore, what is the task to be delegated?

- Identify leader facilitators
- Leader facilitators coach folks on workshop preparation
- Set meetings for maximum attendance
- Run the breakout workshops
- Identify & enroll people who would be good speakers in January workshop

Select the Person/Team Member

1. **What resources do you have available to help you with this?**
 - Evangelist who lead breakouts last December
 - People who are in development programs
2. **Who specifically might be able to undertake the task?**
 - Workshop members and leaders already selected based on past workshops, cross-function exposure, roles, investment targets and working hours.
 - List the names of WHO -
3. **Why would this task be a good assignment for this person?**
 - The leaders are from the evangelist program and from coaching program participants, all on tracks for continued investment in leadership development. Give them training, experience, opportunity and exposure/recognition.
4. **What leadership role will you have to assume for this person to successfully undertake this task?**
Teach/Coach/Entrust (see page 5 Mastering the Art of Delegation)
 - Teacher and coach to selected breakout facilitators
 - Design breakouts to make logistics easy
5. **Is this acceptable to you? YES NO If no, return to Point 2 of this section (*Select the Person*).**
 - YES

Outline the Task

1. **What output do you want? Check one.**
 - d) An implemented solution – facilitators hold good breakout sessions
2. **For that output, what is success?**
 - Workshops held, people attended/engaged, results reported, speakers lined up
 - Thrive initiative advanced – overall Dream Team prepared for quarterly program and more developed in delegation
 - Design that works best for assigned participants to each group
 - Coaching & mentoring role by breakout leader with their assigned participants
3. **If the output is a, b, or c, do you already “know” the answer? If yes, return to Point 3 under *Select the Task*.**

Clarify the Task

1. **Clearly define what outcome is needed; the objectives or the end product of the task. Not the how, just the what.**
 - Small groups to explore and experience delegation through practice and observation in consistent format using the “Plan before you delegate” Form
 - Leaders quickly schedule Zoom Video phone meetings with your provided workshop members
 - In advance ensure each participant prepares by
 - Selecting a delegation that is impending, was recently delivered, recently received, or which you recently avoided doing.

- Each participant fills out a “Plan Before You Delegate Worksheet” to broaden their thinking about the delegation.
 - In workshop, have each participant role-play a delegation experience to one other
 - Have others observe and take notes, provide feedback to that delegator
 - Share delegation worksheet with each other if appropriate
 - Rotate each participant into each role
 - Each facilitator watches for and identifies people who might speak at March 18 workshop
- 2. Outline why this task is important: What is the purpose? What is the relationship to the goals of the function or organization? This provides context for the delegate so they can see how it fits in the big picture.**
- Develop participants with
 - New perspective and delegation skills
 - Practice using the new tool, practice giving a delegation, receiving one, monitoring
 - Immediate constructive feedback from audience
 - Produce superior results in collaboration within and across the teams, receiving the benefits inherent in quality delegation
 - Advance the Thrive initiative by
 - Developing better decision making around delegation
 - Giving participants opportunities to be recognized
- 3. What are the limits of authority that go with the delegated job?**
Can the person hire/recruit other people to work with them?
What are the funds allocated for this task?
- Participants need to work with the participants assigned to their breakout group
- 4. What other resources are available to work on the task?**
- Resources provided by NetApp especially communication and collaboration tools. E.g. Zoom
 - BWLC team available to assist with questions & design
 - Other Facilitators with different groups can share ideas
- 5. What is the priority for this task?**
- High – to set up calendar for meetings
- 6. What is the deadline for completion?**
- 3/1 for completing breakout workshops
- 7. What problems do you foresee the person might encounter? Political, obstructers, jealousy, etc.**
- Scheduling conflicts with initially setting up meetings or defending scheduled time against newly arising conflicts. Leaders should suggest best times and provide information on participants
 - Workshop members declining to attend or engage, or who try to dominate / over engage.
 - Workshop members misunderstanding delegation.
 - Workshop members not doing the homework in advance.
 - End/Start of quarter demands.
- 8. What conditions/constraints must the task satisfy? (financial/resources/morale/precedent/etc.)**
- Should satisfy scheduling requirements of participants
 - Timing of quarterly program meeting and end of quarter

9. How often and when will the progress report meetings occur?

- Email as each step is completed
 - When meetings are initially scheduled, including when and with who
 - When each meeting is completed, including short summary and insights
 - When a speaker from your workshop has agreed to be nominated and who
- Engage with Ron Collier if unsolvable problems are encountered or if more information, insight or coaching are desired.

10. What form will the outputs take?

- Letter/memo – email to Ron at rcollier@balancedworklife.com
- **Report**
- Informal verbal report – Call Ron at +1-813-846-7849
- **Presentation**
- **Project Plan**

11. Who else needs to know that this person is empowered for this task?

- Dream Team Leaders and workshop members