

Delegation Skills

Presented by
IMA Leadership Academy

Penny Weller, Ph.D., CMA

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The Association of
Accountants and
Financial Professionals
in Business



Webinar Features and CPE Credit

Q&A

Asking Questions



Participant Quick Guide



Help



CPE Credit

Certification

Criteria for Partial Credit Option 1

- ☐ Minutes to Watch: 50
- ☐ Number of Completed Polls required: 3

Criteria for Full Credit

- ☐ Minutes to Watch: 75
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Moderator



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Featured Presenter



Penny Weller, Ph.D., CMA
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Penny Weller's Biography

- Penny is North American Global Business Services Advisory program leader at the Hackett Group. Penny provides research, key insights, and advisory services to Global Business Services and Shared Services in finance, HR, IT, and Supply Chain.
- Before joining The Hackett Group, she was a finance executive with Pfizer (formerly Pharmacia).
- She is a Six Sigma Motorola-certified Black Belt and an active IMA member – since 1990, previously serving on the Global Board.

Course Goal and Agenda

The **goal of this course** is to develop an understanding of the importance of delegation as it pertains to employees, managers, and organizations by detailing the principles and skills necessary to properly delegate.

Our agenda is as follows:

- ☒ Overview
- ☐ Benefits and Challenges of Delegation
- ☐ Six Steps to Delegation
- ☐ Coaching
- ☐ Feedback
- ☐ Next Steps

Learning Objectives

AFTER THIS SESSION, ATTENDEES WILL BE ABLE TO:

DEFINE

delegation.

LIST

the benefits and challenges associated with delegation.

DESCRIBE

how to assign tasks and responsibilities to others.

IDENTIFY

key management skills involved in delegation.

INDICATE

coaching principles needed for delegation success.

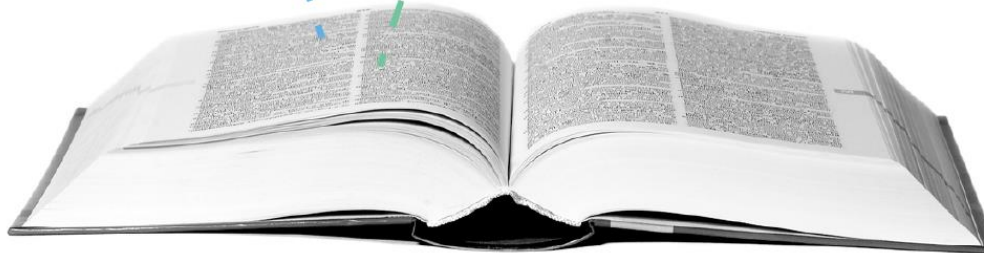


BENEFITS AND CHALLENGES OF DELEGATION

Delegation is...

The **art** of getting things done through other people.

The **skill** of transferring to someone else a portion of your authority and responsibility while remaining accountable for the task.



Benefits of Delegation - Employees

- Acquire new skills and responsibilities
- More task variety and diversity
- Increased confidence and self-esteem
- Broader perspective on their work
- Higher job satisfaction



Benefits of Delegation - Managers

- More time
- Develops staff skills and abilities
- More productive work team
- Increased team morale
- More personal power with team
- More valuable to the organization
- Helps the manager grow and develop



Benefits of Delegation - Organization

- More cost-effective
- Skills and knowledge are more widely distributed
- Retention increases
- More people feel motivated and responsible
- Enablement and empowerment increase



Challenges in Delegation - Employees

- Lack of experience and competence
- Work overload
- Fear of making mistakes
- Complacency or avoidance of responsibility



Challenges in Delegation - Managers

- “I can do it better myself” attitude
- Reluctance to give up control
- Too busy to provide instruction and guidance
- Lack of trust or confidence
- Lack of delegation skills



Challenges in Delegation - Organization

- Rigid job descriptions and responsibilities
- Time pressures
- No tolerance for mistakes
- Lack of personnel who can be groomed for higher-level duties



Poll Question #1

Of the delegation benefits to managers, which appeals to you the most?

- a. More time
- b. Developing your staff's skills and abilities
- c. Increased team morale
- d. Growing in your own management skills
- e. Becoming more valuable to the organization



Poll Question #1 Results



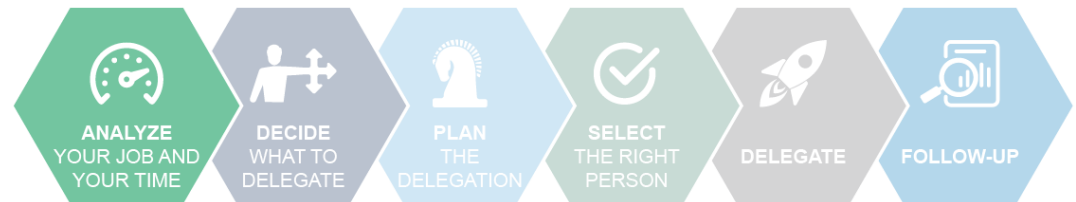
SIX STEPS TO DELEGATION

Six Steps to Delegation



1. Analyze Your Job and Your Time

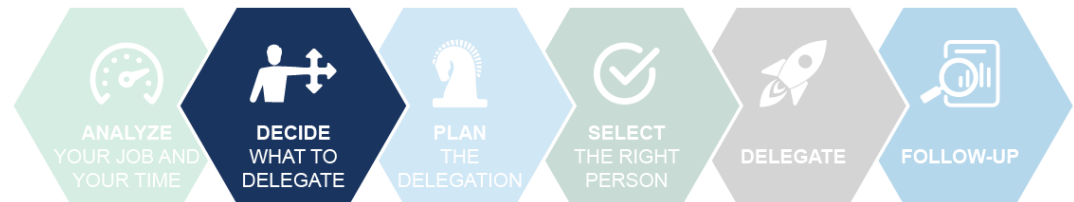
- What tasks are you expected to complete?
- Of these tasks, which are the most critical ones you should be working on?
- Which tasks could be done by others?



2. Decide What to Delegate

CONSIDER:

- Decisions you make most often
- Areas where others are better qualified
- Tasks that make good learning assignments
- Skills you want developed and distributed in your team
- Tasks where direct reports need development or more variety
- Delegate things that will increase time and process efficiencies



3. Plan the Delegation

- Review your goals and the essential details
- Consider the level of authority you will maintain
- Establish performance standards
- Determine feedback controls
- Identify necessary resources
- If necessary, consider how to delegate from a distance
- Consider cultural differences, if applicable



4. Select the Right Person

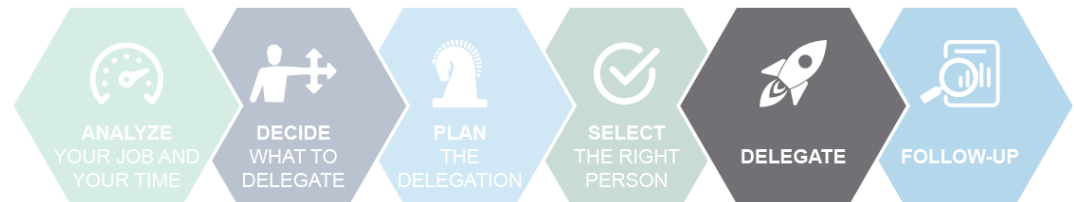
CONSIDER:

- People's interests, abilities, attitude, and maturity
- Who most needs challenges
- Long-term employee development
- The training needed and its availability
- The level of authority the person can handle
- The size of the task and if more than one person is necessary
- Avoid the pitfall of familiarity



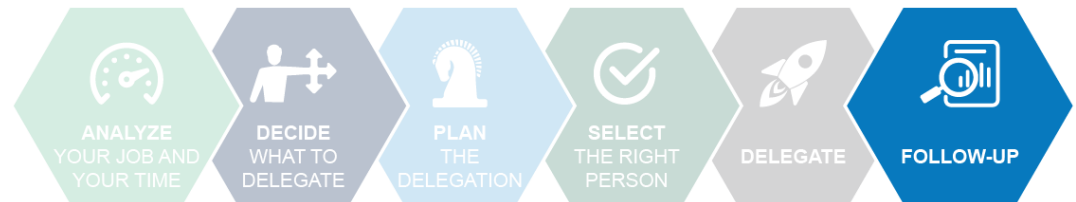
5. Delegate

- Clearly communicate expected results, priorities, and the desired approach
- Discuss and answer the employee's questions
- Clarify authority and responsibility
- Explain the importance of the task and how it fits into the “big picture”
- Ask for a commitment



6. Follow-up

- Insist on timely feedback and information
- Insist on results, but not perfection
- Encourage independence
- Be open to different approaches to the desired result
- Don't short-circuit or “snatch back” assignments
- Reward good performance
- Coach and provide feedback to your employees over the long-term



Six Steps to Delegation – Review



Poll Question #2

Of the six steps for delegating, which do you find most challenging?

- a. Analyzing your job and your time
- b. Deciding what to delegate
- c. Planning the delegation
- d. Selecting the right person
- e. Delegating
- f. Following-up



Poll Question #2 Results



COACHING

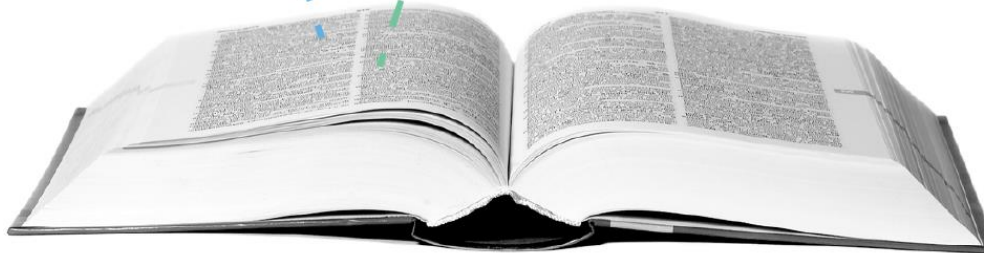
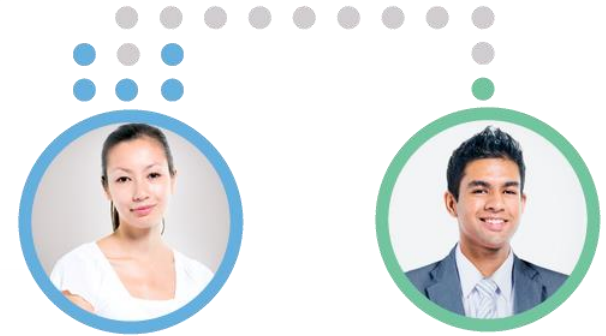
Coaching Defined



Asking focused questions to help an individual learn and grow ●

It is used for....

- Setting performance goals at the start of a task
- Helping a good performer get even better
- Helping someone who is underperforming



The Right Environment for Coaching



- Set aside private, uninterrupted time
 - Face-to-face with each other
-

Do **NOT** coach when:



- One person is preoccupied, stressed, or emotional
- There is an emergency or major time crunch
- There is only one acceptable answer – and you have it

Open-Ended Questions



OPEN-ENDED
QUESTIONS

REQUESTS

- “Tell me more about”
- “Explain ...”
- “Give me an example of ...”

WHO, WHAT, WHEN, WHERE, HOW QUESTIONS

- What were you most satisfied with in your performance?
- How might you approach this project, based on your past experience?



Listening Strategies



Face the speaker and adopt a physical posture that shows interest.

Listen for central ideas, not every single fact.

Limit internal and external distractions.

Reflect back what is being said to ensure understanding.

Withhold judgment, focusing on content rather than delivery.

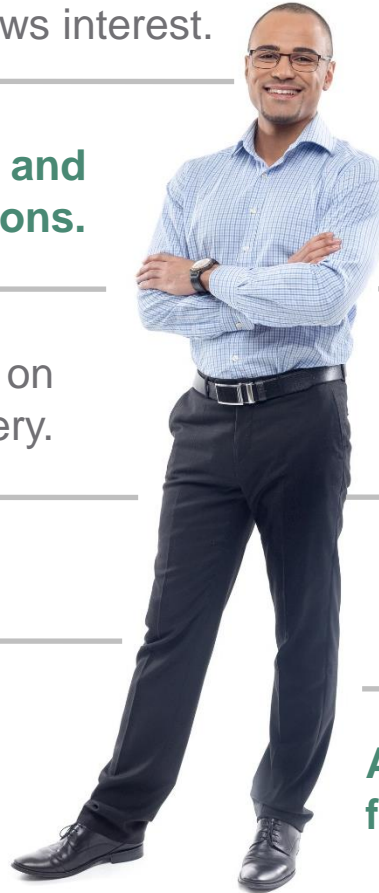
Ask probing questions only during pauses.

Do not interrupt the speaker.

Tune into nonverbal cues from the speaker.

Do not think about how you will respond to what is being said.

Ask for feedback from others.



Match the Speaker's Language



VISUAL

Appear, bird's-eye view, clarify, clear-cut, dark, dress up, enlighten, examine, expose, focus, glance, glimpse, graphic, hazy idea, hindsight, illusion, illustrate, in light of, in view of, look, make a scene, mind's eye, notice, obvious, outlook, perspective, picture, pinpoint, reveal, see, short-sighted, spectacle, vague



AUDITORY

Audible, call, clear as a bell, clearly expressed, compose, discuss, earful, earshot, harmonize, hear, hidden message, listen, loud and clear, manner of speaking, mention, note, outspoken, remark, report, say, scream, shout, silence, sing, sound, speechless, tell the truth, tongue-tied, tune-in, voice, word for word



KINESTHETIC

Affected, bear, boils down to, carry, cold, cool, crash, crawl, emotional, foundation, get a load of this, get in touch with, grab, grip, handle, hang in there, hassle, heated, hold, hot-headed, impact, irritate, lay cards on the table, lukewarm, motion, muddled, nail, pressure, sore, stress, strike, tap, throw, tickle, tied up, touch, wring

Poll Question #3

Which part of coaching do you find most challenging?

- a. Finding private, uninterrupted time to coach
- b. Asking the right questions
- c. Deeply listening to the other person
- d. Matching the other person's representational system



Poll Question #3 Results



FEEDBACK

Feedback Defined



Sharing your perceptions of another's performance based upon objective analysis and observation.



Benefits of Positive Feedback

GALLUP SURVEY

- When managers focus on employees' strengths, **67%** of employees are engaged.
- When managers focus on employees' weaknesses, only **31%** are engaged.



IBM WORK TRENDS SURVEY

- Those who received recognition had engagement levels almost **three times** that of those who did not receive recognition.
- Those who receive recognition are far less likely to quit.

Source: See Bibliography [10]

Implications of Not Giving Feedback



MANAGER

- People continue to make the same mistakes.
- It reflects badly on their management abilities.



EMPLOYEE

- They develop substandard skills and competencies.
- Errors continue.
- They think their performance is fine.
- Their career advancement is hindered.








ORGANIZATION

- Their work as a group is of lower quality.
- Some will think that lower work standards are acceptable.
- Discontent spreads when some get by with low-quality work.

When to Give Feedback





WHEN IT HELPS



-  It is requested.
-  To reinforce what someone is doing right.
-  To point out outstanding work.
-  It will help them develop.
-  At the end of a delegated task or project.

WHEN IT DOESN'T HELP



-  The person has no control over the area.
-  The feedback is vague.
-  When stressed, rushed, angry, or overwhelmed.
-  It might be overheard.

Feedback Guidelines



Be timely.



Clearly and specifically state what the person has done right and what needs to change.



Base feedback on behaviors –
don't get personal.



Be willing to take the
necessary time.

Deliver feedback
honestly and
kindly.



Three Steps to Deliver Feedback



1 Briefly and clearly describe the situation and the behavior that needs to be modified.

2 Describe the impact on you or the organization.

3 Identify and agree upon alternate behaviors.



Example of Delivering Feedback

| STEPS | EXAMPLE |
|--|---|
| 1 Briefly and clearly describe the situation and the behavior that needs to be modified. | <i>"I know you worked closely on the last-minute request we got this morning from the senior manager. I observed several accounting errors in the information that was sent out."</i> |
| 2 Describe the impact on you or the organization. | <i>"While the errors won't have a serious impact on client revenues, any numerical errors in the materials we send out reflect poorly on our office."</i> |
| 3 Identify and agree upon alternate behaviors. | <i>"In the future, especially in a crunch situation like this, please double-check the figures. I encourage you to ask someone else on the staff to double-check the figures as well. We all need to work together to make sure we get information out quickly and accurately."</i> |

Poll Question #4

From the implications of not giving feedback, which of the following have you observed most often?

- a. Repeated mistakes
- b. Substandard skills and competencies
- c. Low-quality work is accepted
- d. Discontent spreading in the team
- e. Career advancement hindered



Poll Question #4 Results

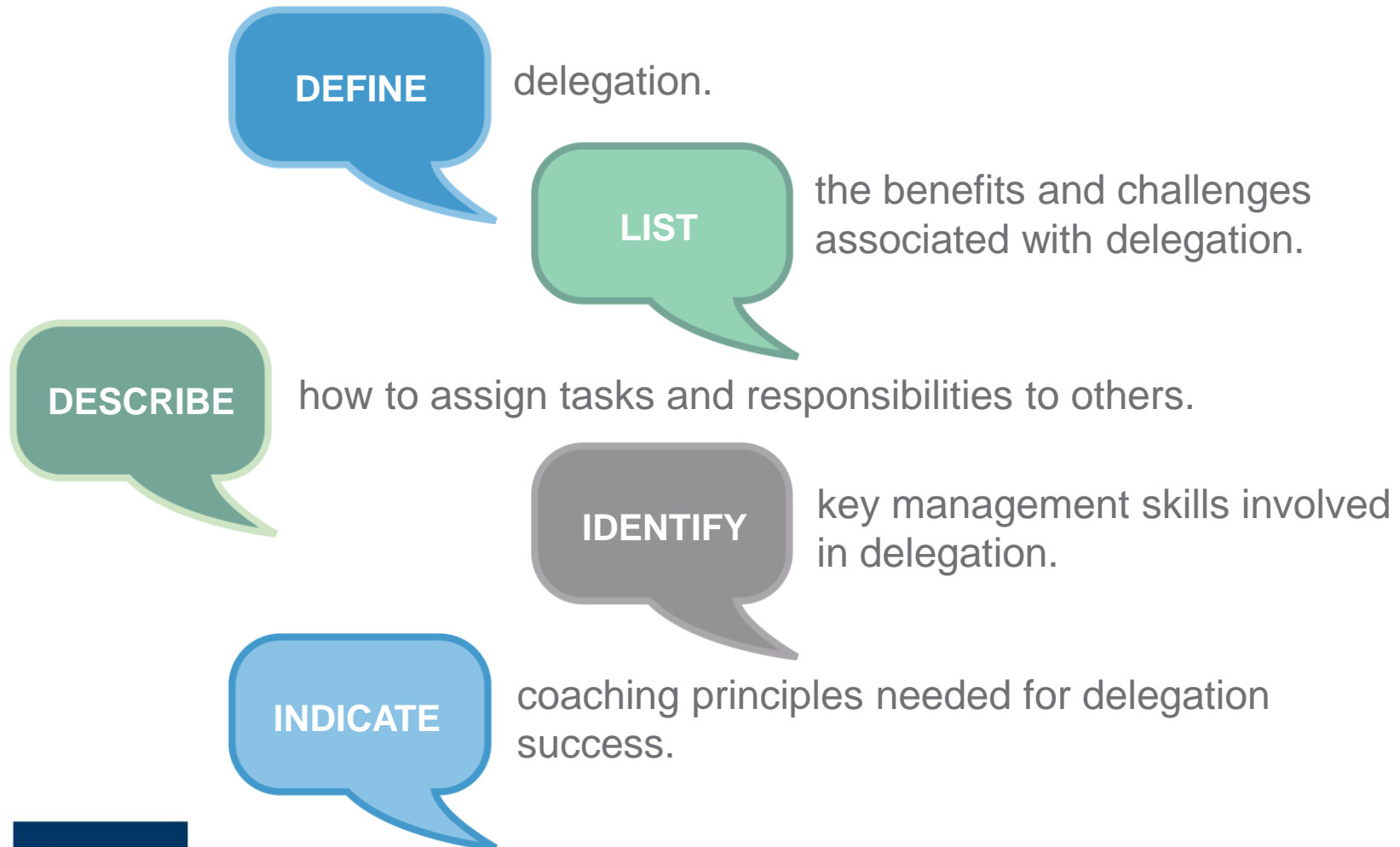


CLOSE

Key Points



Learning Objectives, Revisited



Poll Question #5

From the following, which is an area you want to focus on improving for yourself?

- a. Deciding what to delegate
- b. Delegating to the right person
- c. Following up on the delegated task
- d. Asking good open-ended questions
- e. Deeply listening
- f. Delivering more positive feedback
- g. Delivering feedback



Poll Question #5 Results

Action Plan

- 1** What are two tasks you want to delegate in the next month?
- 2** What are two actions you want to take to provide better coaching?
- 3** What are two actions you want to take to provide better feedback?



Questions & Answers

Use the Q & A Panel to send your questions to our panelists.



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Thank You to Our Featured Presenter!



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Thank You to Our Moderator!



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Final Reminders

- ▶ **Complete the Evaluation poll** – on your screen
- ▶ **Access to your CPE Certificate** – 2 Options
 - Click the “CPE” icon at the bottom of your console
or
 - Click the link in your post-event email
- ▶ Please print a copy of the CPE certificate for your records.
- ▶ Your CPE credit will be automatically recorded in your member transcript.



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For nearly 50 years, the CMA certification has been the global benchmark for accounting and finance professionals. It demonstrates mastery in 12 critical practice areas in business, including technology, analytics, financial planning and analysis, performance, and control. Professionals who earn the CMA can gain greater credibility, career advancement opportunities, and higher earning potential.

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