



Welcome to

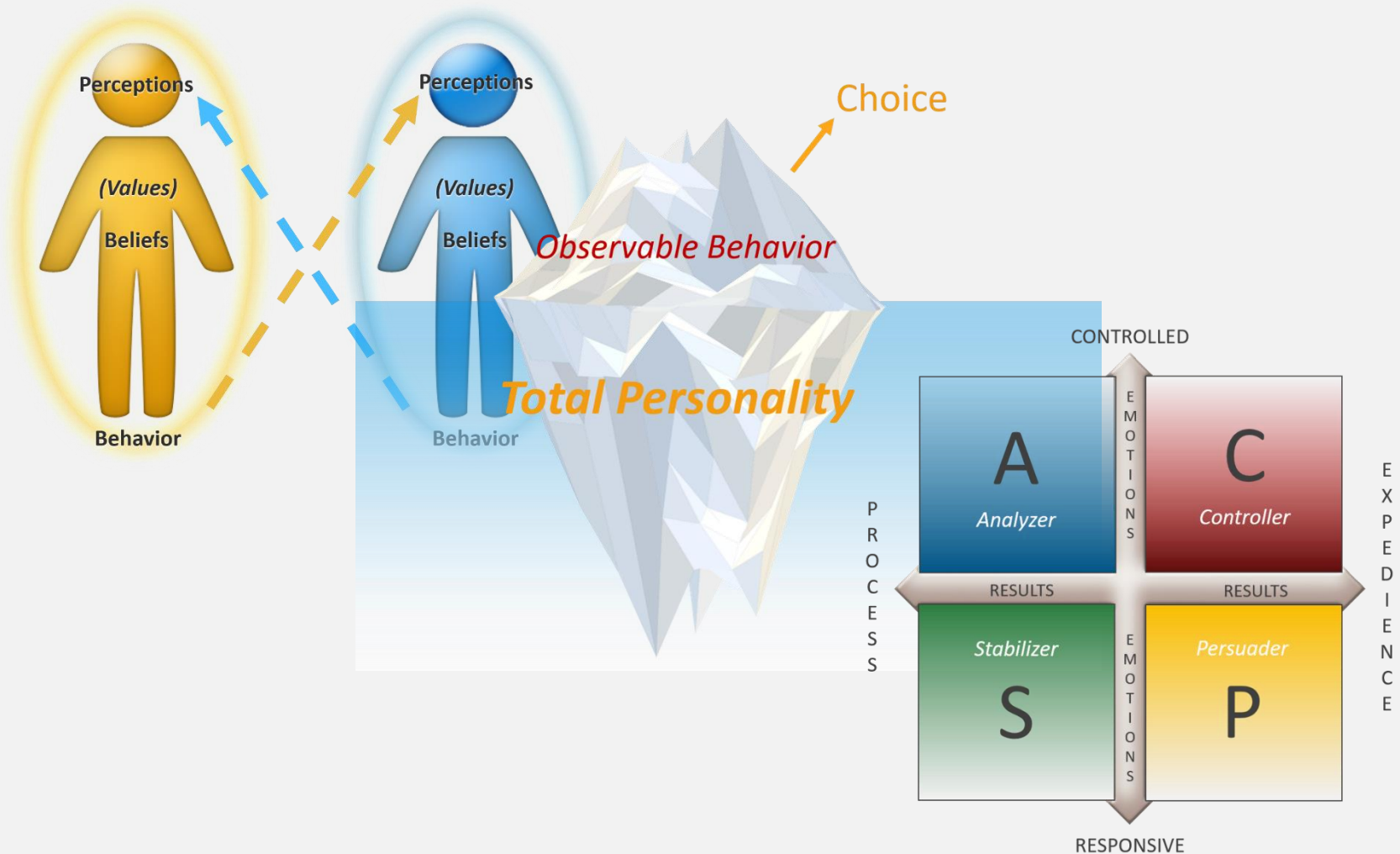
Purposeful Delegation and Managing Change

Part One

Let's review...



SESSION ONE: Understanding Behavior Styles



SESSION TWO: Leadership Fundamentals & Effective Comm Skills

The ability to demonstrate:

the appropriate behavior

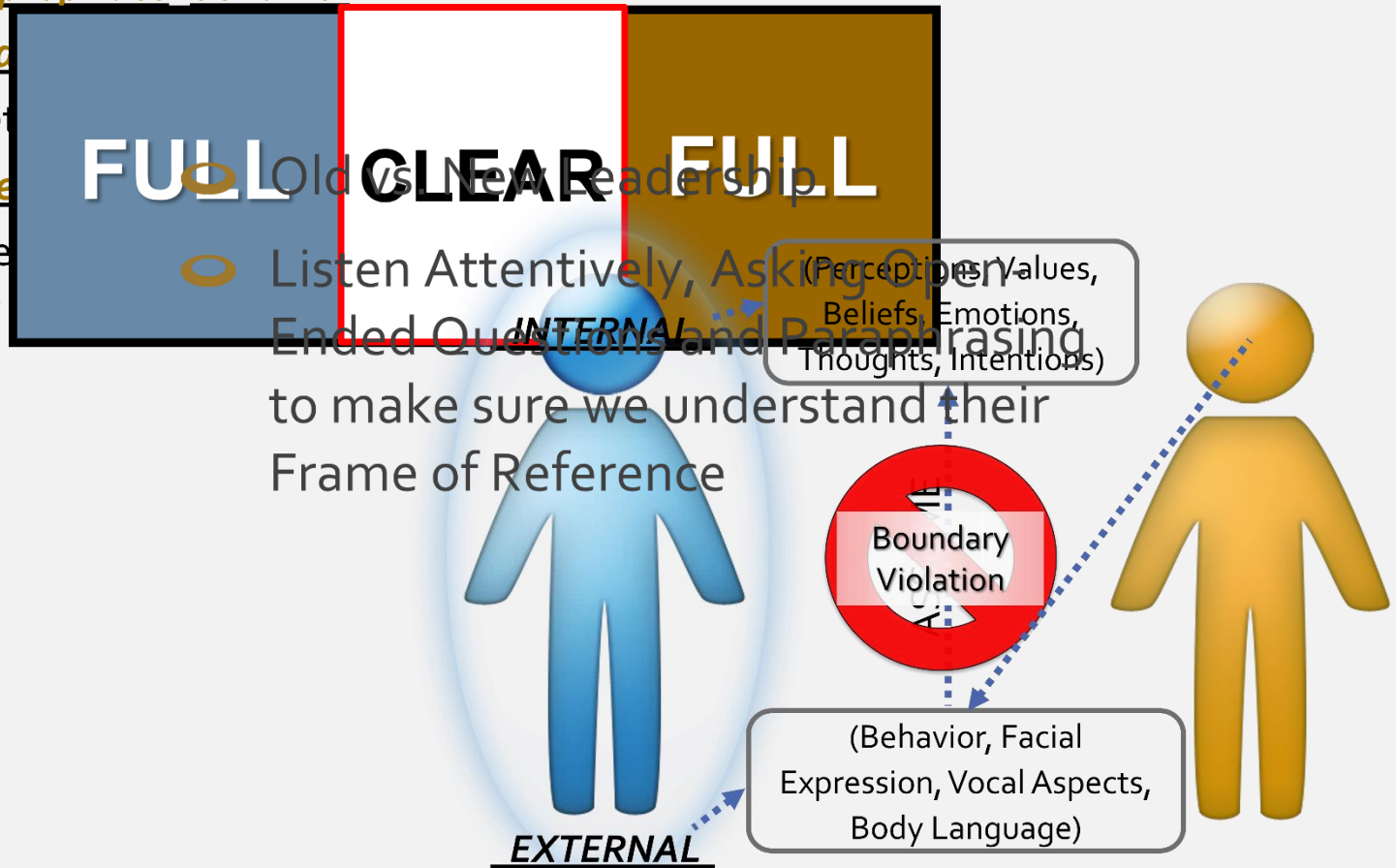
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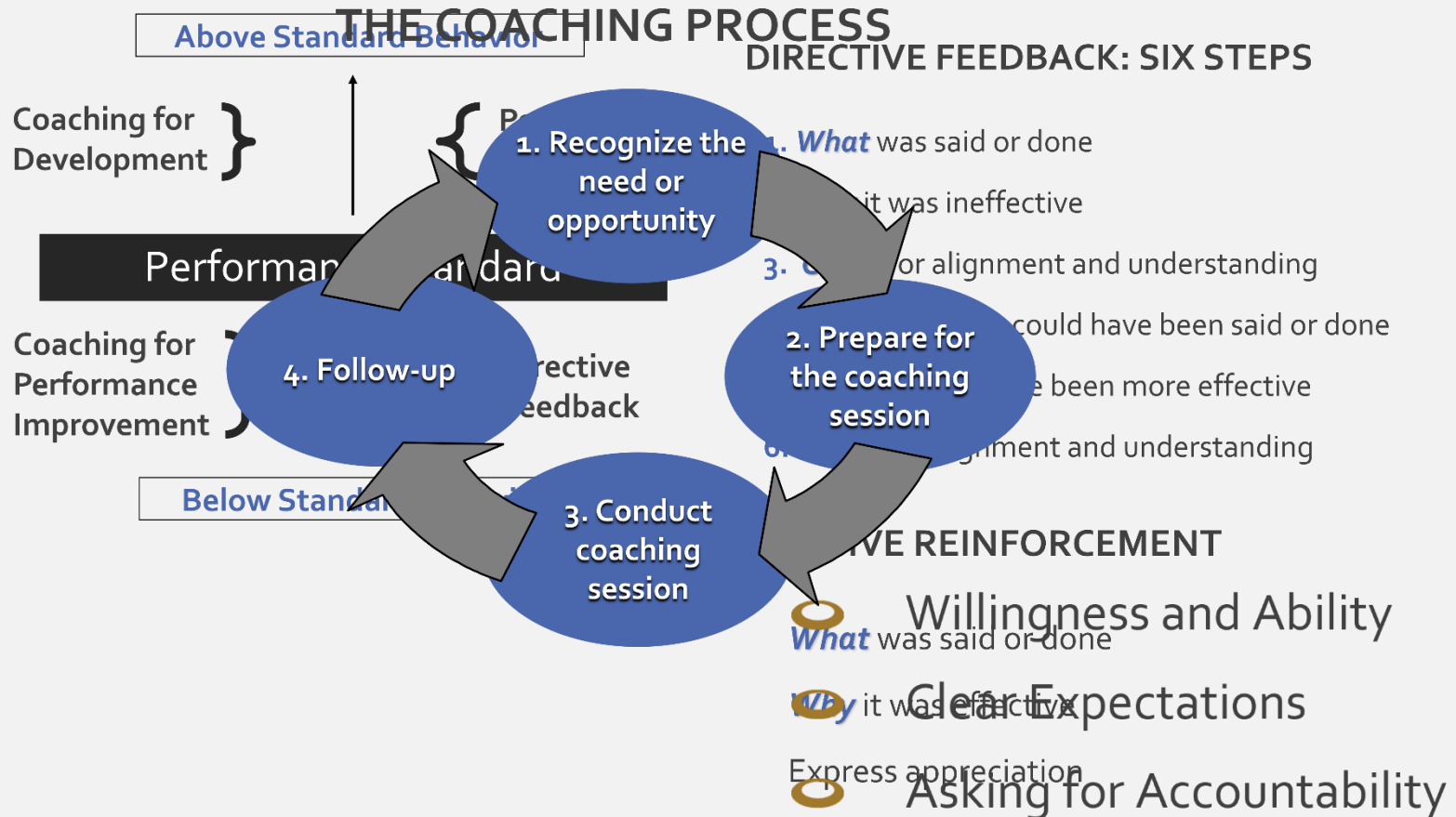
in real



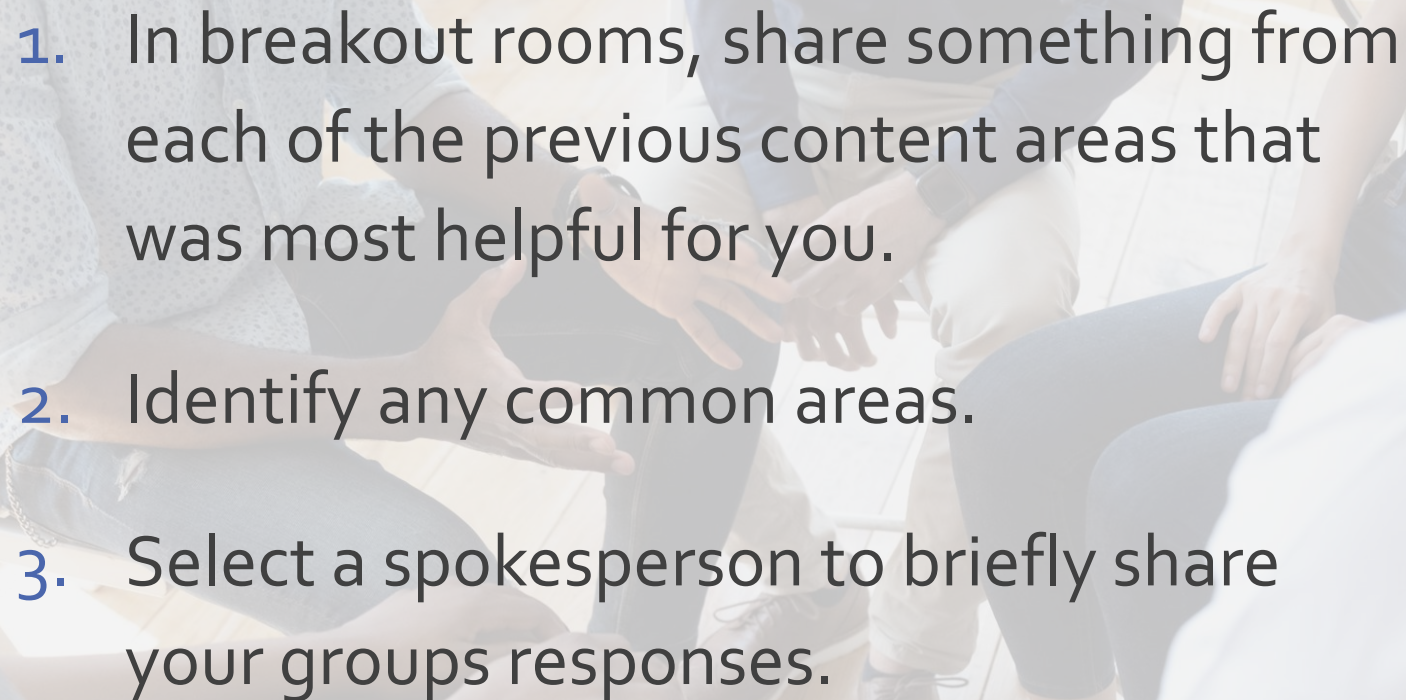
SESSION THREE: Coaching for High-Performance: Overview

COACHING OVERVIEW

THE COACHING PROCESS



SESSIONS ONE, TWO, AND THREE

- 
1. In breakout rooms, share something from each of the previous content areas that was most helpful for you.
 2. Identify any common areas.
 3. Select a spokesperson to briefly share your groups responses.

Timing: 10 minutes

PURPOSEFUL DELEGATION: OBJECTIVES

- Define delegating.
- Distinguish the difference between delegating, dictating and dumping.
- Review a delegation checklist.
- Identify the four steps of the delegation process.
- Discover a decision-making authority model.
- Make a delegation plan.

MANAGING CHANGE: OBJECTIVES (cont.)

- Explore common reasons and reactions to change.
- Consider the importance of urgency in change.
- Discover strategies for managing change.
- Consider how change relates to behavior style needs.



Purposeful
Delegation

CHAT

What words or phrases come to mind when you think of “delegating”?



WHAT IS PURPOSEFUL DELEGATION?

- Purposeful delegation is a process of developing others by communicating, educating, following up and showing appreciation.
- Delegating implies four actions:
 1. Sharing knowledge
 2. Providing authority
 3. Committing support
 4. Recognizing effort and accomplishment

WHAT IT ISN'T...

- Dictating utilizes position power. It is over-functioning behavior.



WHAT IT ISN'T...

- Dumping utilizes either position power or personal power. It is under-functioning behavior.

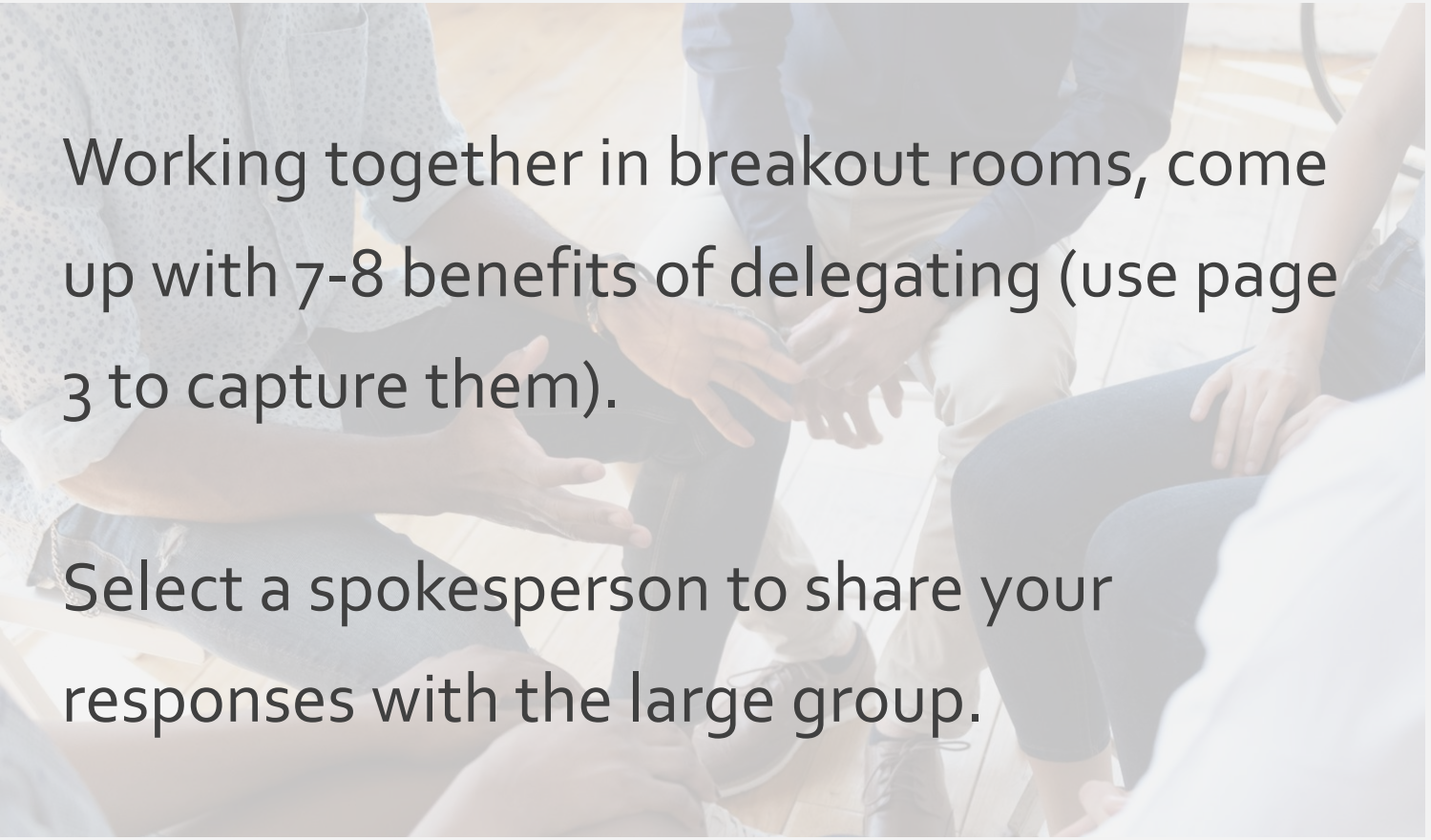


REACTIONS

Has someone ever “delegated” work to you and it felt like dictating or dumping?



WHY DELEGATE?



Working together in breakout rooms, come up with 7-8 benefits of delegating (use page 3 to capture them).

Select a spokesperson to share your responses with the large group.

Timing: 7 minutes

CHAT

What are some of the biggest challenges involved in delegating?



Purposeful Delegation Checklist



Key Questions to Consider

○ Time

○ Risk

○ Ability

○ Willingness



CHAT

How do you know if someone is willing to do the task or responsibility you are trying or want to delegate to them?



Purposeful Delegation Checklist



Key Questions to Consider

- Time
- Risk
- Ability
- Willingness
- Development
- Level of Trust and



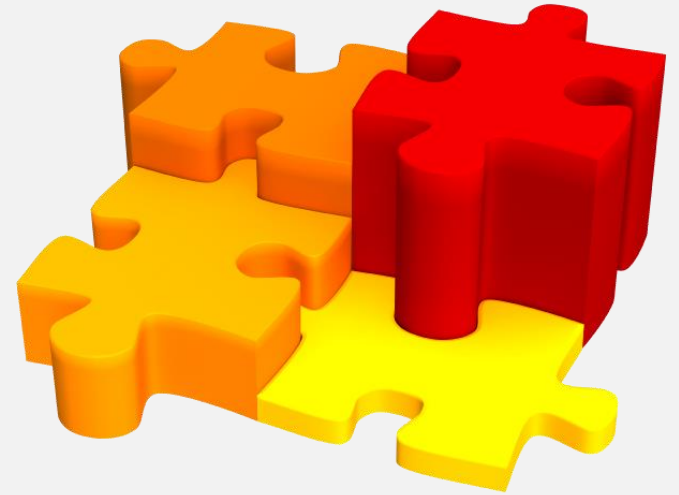
CHAT

What are some things that should definitely not be delegated?



PURPOSEFUL DELEGATION: FOUR STEPS

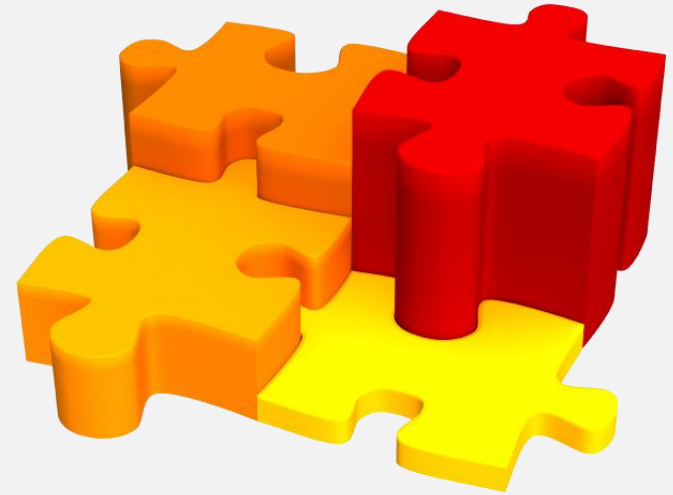
1. Communicate
2. Educate
3. Follow-Up
4. Appreciate



PURPOSEFUL DELEGATION: FOUR STEPS

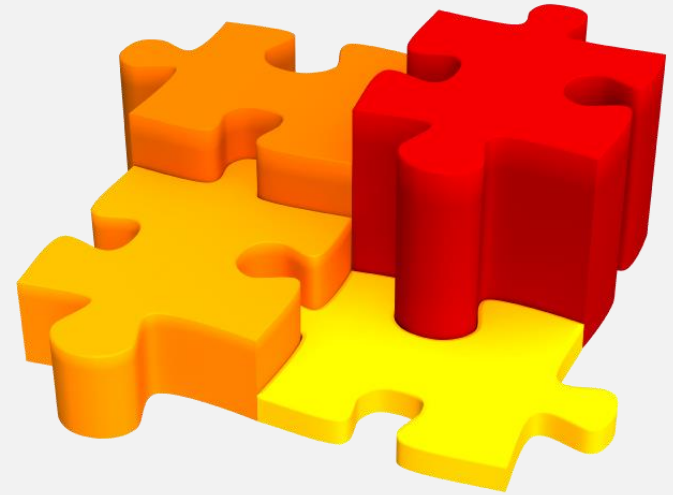
1. Communicate

- Why
- What
- How
- Accountability
- Responsibility
- Authority
- Agreement



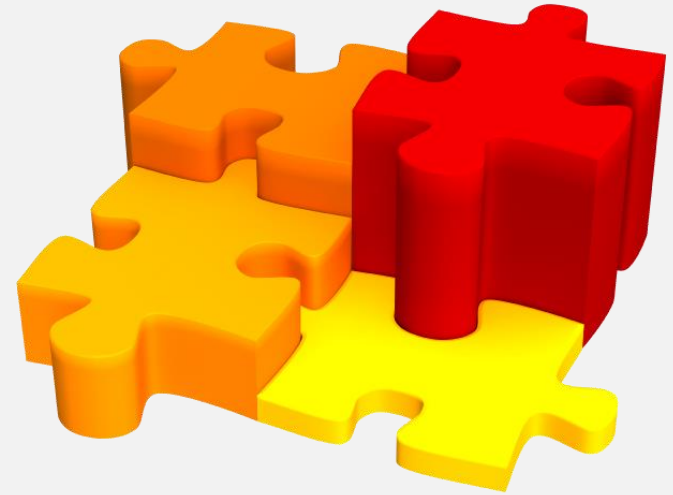
PURPOSEFUL DELEGATION: FOUR STEPS

1. Communicate
2. Educate
 - Skill Level
 - Willingness
 - Policies/Procedures



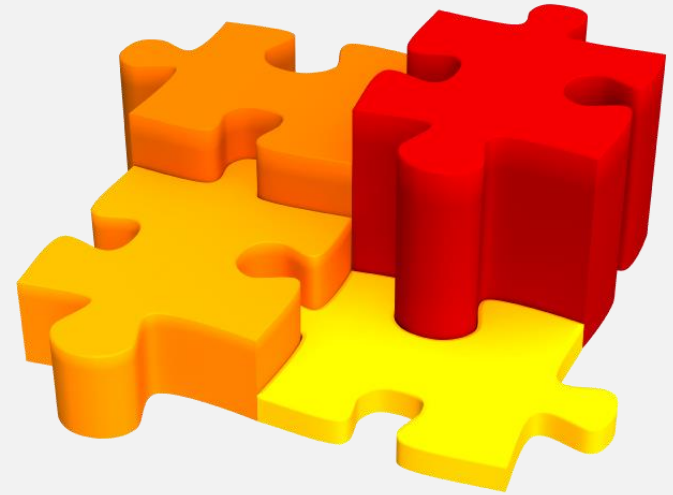
PURPOSEFUL DELEGATION: FOUR STEPS

1. Communicate
2. Educate
3. Follow-Up
 - Evaluate
 - New Targets
 - Clarify Authority



PURPOSEFUL DELEGATION: FOUR STEPS

1. Communicate
2. Educate
3. Follow-Up
4. Appreciate
 - Acknowledge
 - Affirm



DELEGATION AUTHORITY

1	2	3	4	5
Me	You Influence Me	We	I Influence You	You

For there to be purposeful delegation, the level of authority and definition of "influence" must be clear to both parties.

ANNOTATE

Which level of delegating authority is occasionally appropriate, but the least efficient and desired?

1	2	3	4	5
Me	You Influence Me	We	I Influence You	You

CHAT

What are the possible negative effects if you do not give enough authority when delegating something?





Welcome to

Purposeful Delegation and Managing Change

Part Two

CHAT

What was the most helpful takeaway from the first part of today's session?



DELEGATION PLAN

A group of people are sitting in a circle on a wooden floor, engaged in a discussion. The image is overlaid with a semi-transparent grey box containing text. The people are wearing casual business attire, including button-down shirts, jeans, and trousers. Their hands are visible, some gesturing as they talk.

In breakout rooms, discuss your Delegation Plan with your colleagues.

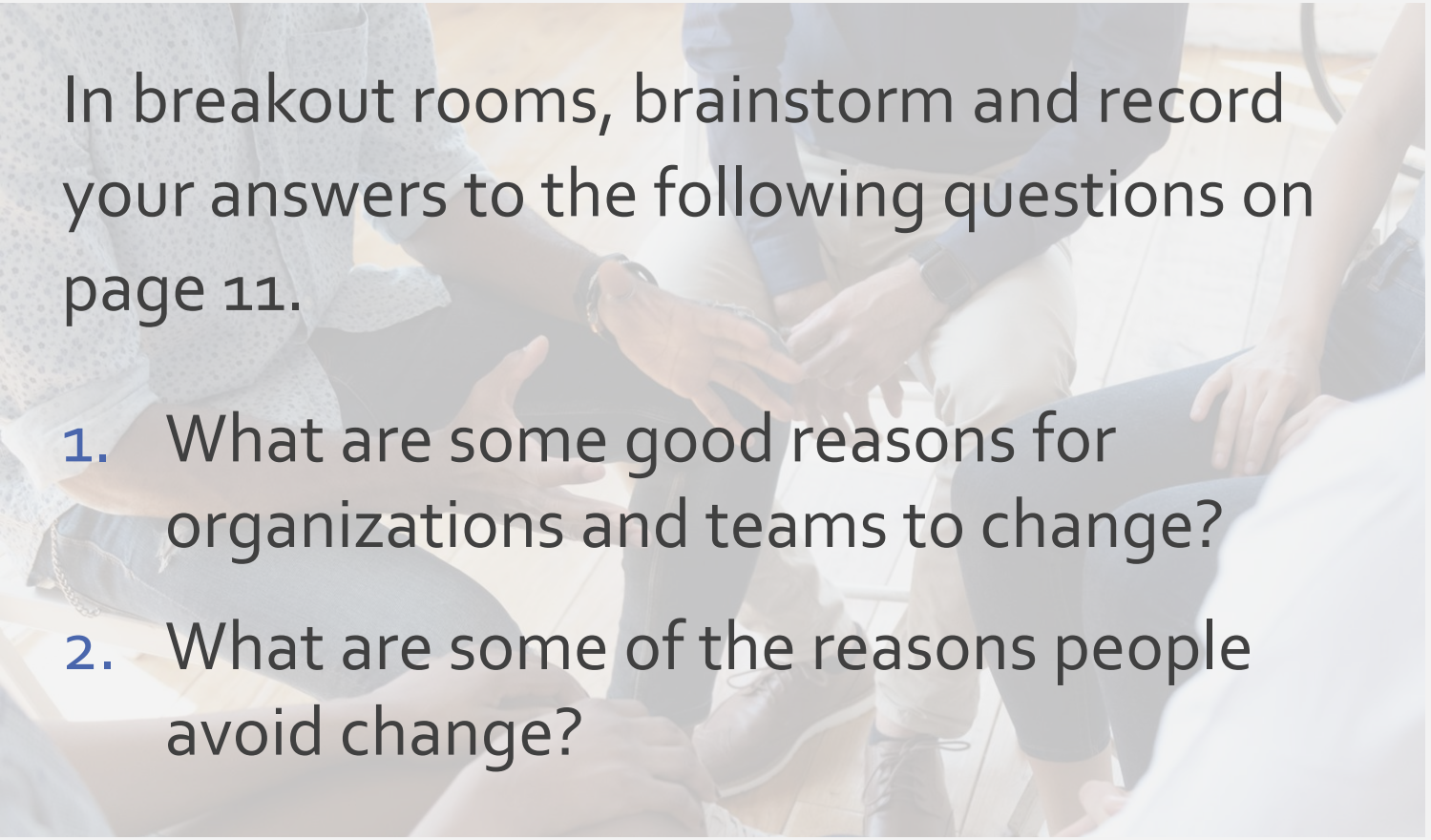
Look for ways to improve your plan.

Timing: 8 minutes



Managing Change

CHANGE



In breakout rooms, brainstorm and record your answers to the following questions on page 11.

1. What are some good reasons for organizations and teams to change?
2. What are some of the reasons people avoid change?

Timing: 8 minutes

POLL: WHAT DO YOU THINK?

What percentage of major change efforts in organizations fail to achieve the desired or intended results?

1. 39%
2. 47%
3. 55%
4. 62%
5. 70%



A large, 3D-rendered graphic of the text '70%'. The '70' is in a vibrant red color, while the '%' symbol is in a light grey color. The characters are thick and blocky, casting soft shadows on the white surface below them. The entire graphic is set against a plain white background.

*Percent of major change initiatives that
are considered failures*

CHAT

What is the most common reaction to many workplace changes?



The #1 reason change efforts fail:



RESISTANCE

FOUR THINGS THAT HELP REDUCE RESISTANCE TO CHANGE



Urgency



Three Core Words

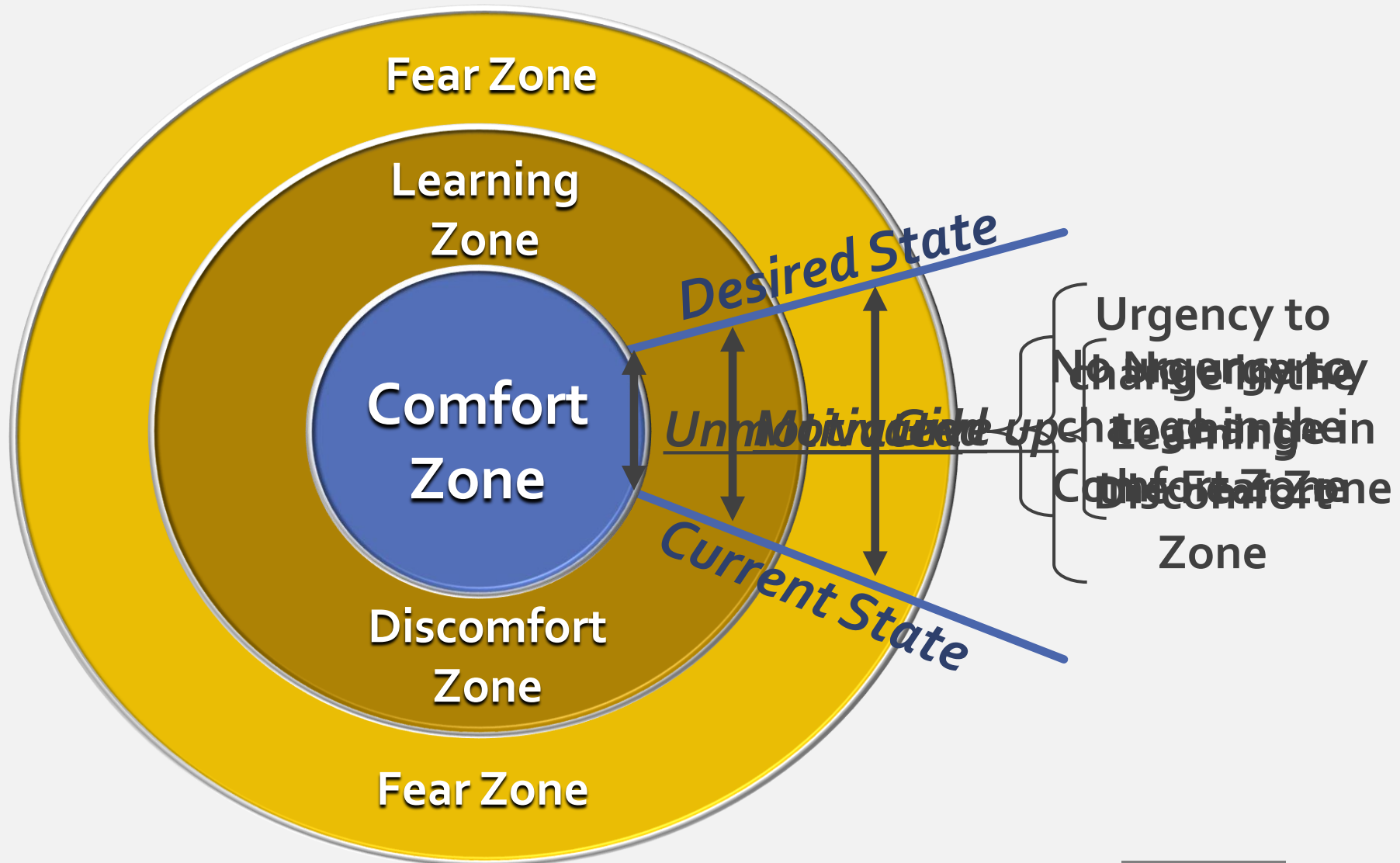


The Strategies



Behavior Styles

CREATING URGENCY



THREE CORE WORDS

HOW

WHAT

WHY

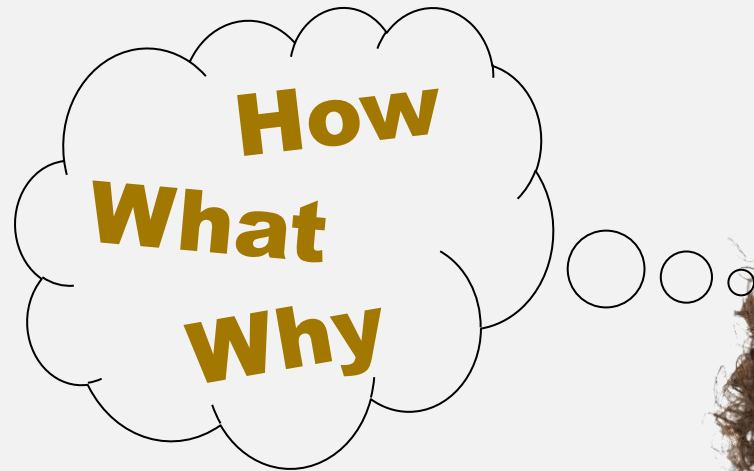
1. _____

2. _____

3. _____

CHAT

What is the correct order for these three words (first, second, third) when you are communicating a change?



THREE CORE WORDS

HOW

WHAT

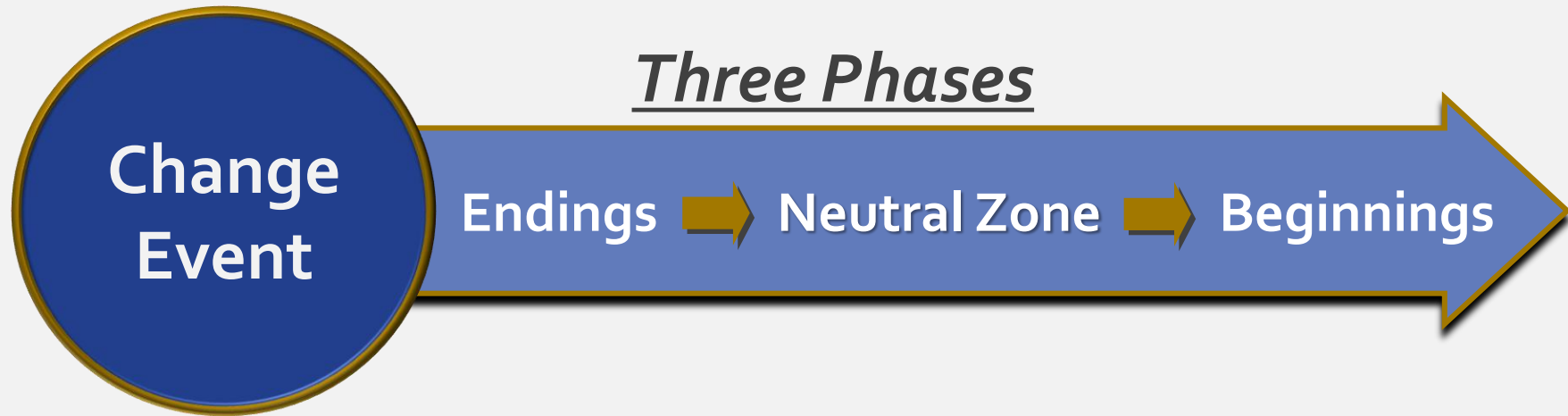
WHY

1. WHY

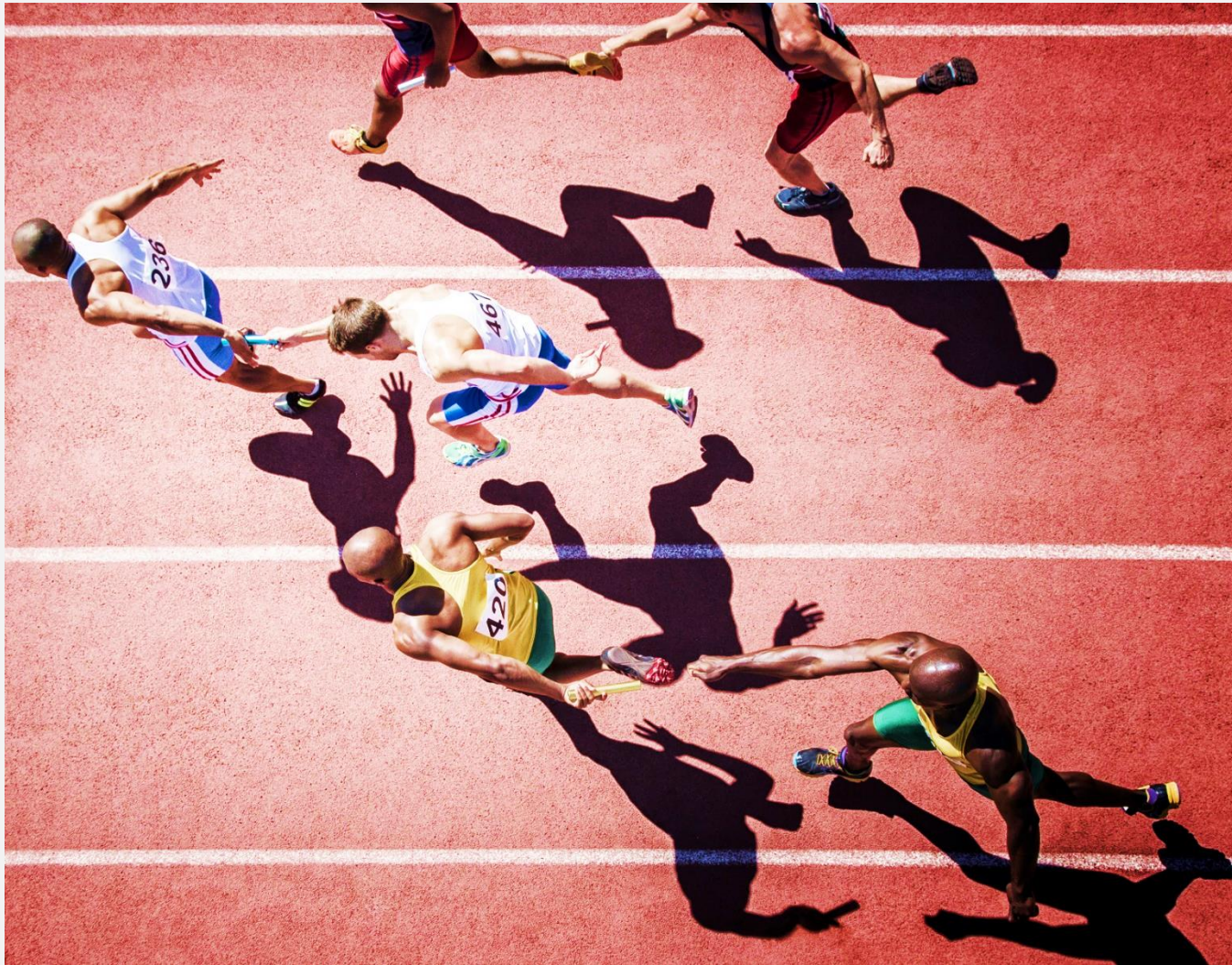
2. WHAT

3. HOW

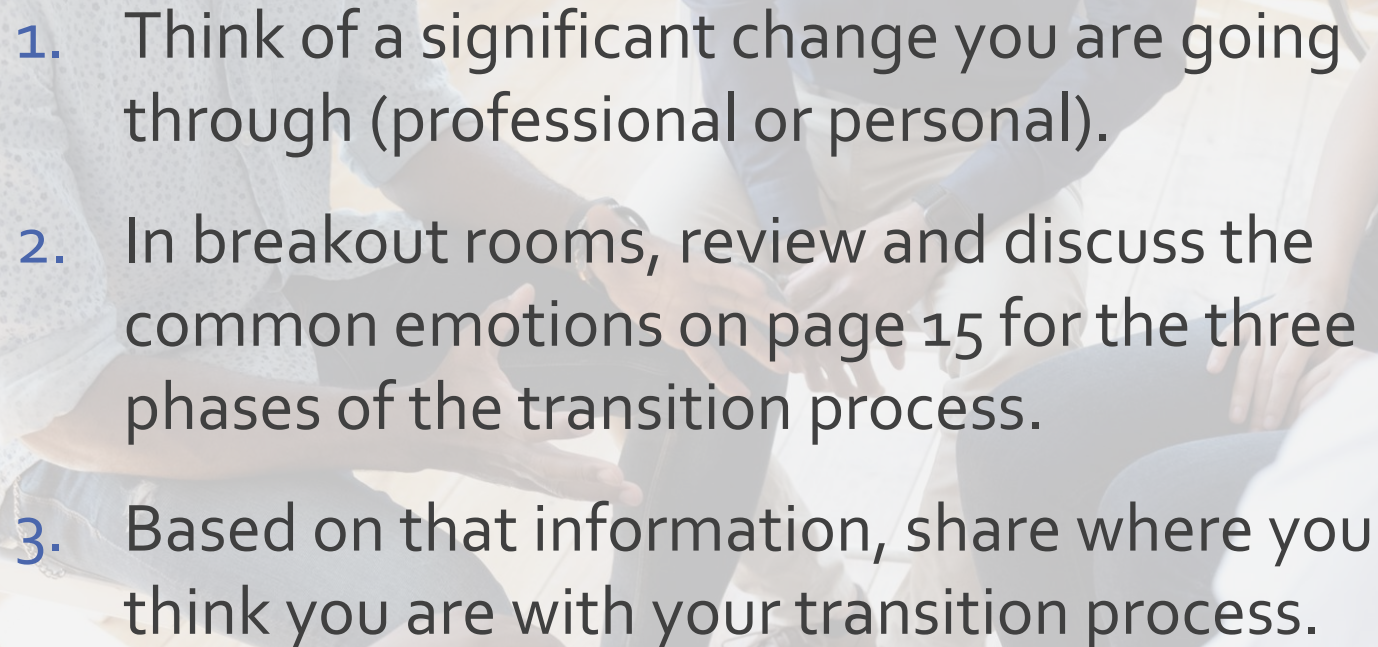
THE TRANSITION PROCESS



THE THREE PHASES IN TRANSITIONS



CHANGE

- 
- A group of people are sitting in a circle on the floor, engaged in a discussion or activity. The image is slightly faded and serves as a background for the text.
1. Think of a significant change you are going through (professional or personal).
 2. In breakout rooms, review and discuss the common emotions on page 15 for the three phases of the transition process.
 3. Based on that information, share where you think you are with your transition process.

Timing: 8 minutes

POLL: WHICH PHASE?

From your breakout room discussion about the list of common emotions, which phase are you mostly in with your change/transition?

1. Endings
2. Neutral Zone
3. New Beginnings



STRATEGIES FOR CHANGE



STRATEGIES FOR CHANGE

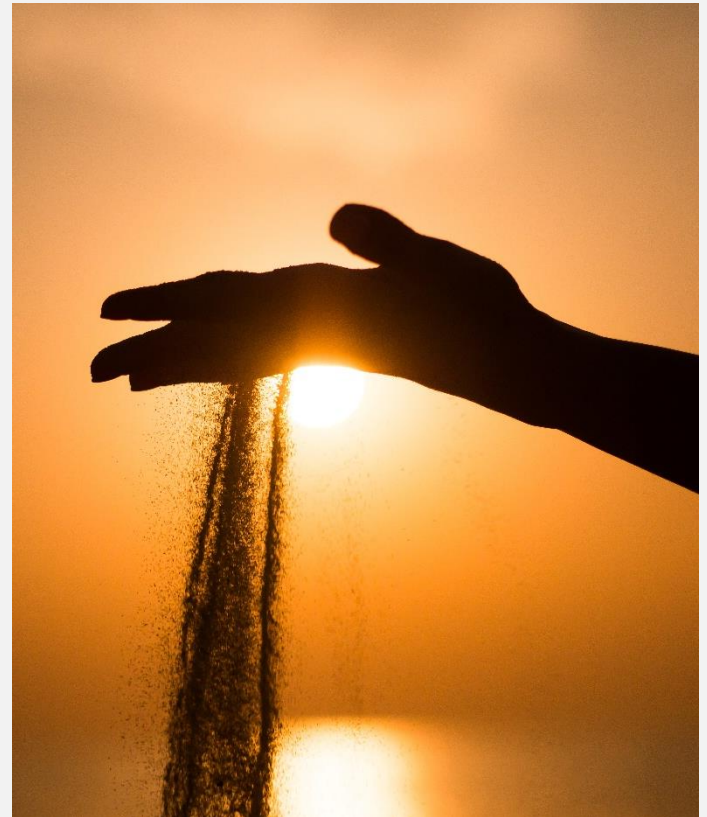
1. Recognize Emotions



STRATEGIES FOR CHANGE

2. Sort Your Losses

- Attachments
- Turf
- Structure
- Future
- Meaning
- Control



CHAT

Which of these losses have you experienced in the change you discussed in breakout rooms?

- Attachments
- Turf
- Structure
- Future
- Meaning
- Control



STRATEGIES FOR CHANGE

3. Create Structure



STRATEGIES FOR CHANGE

4. Conduct a Reality Check



STRATEGIES FOR CHANGE

5. Appreciate What Was



STRATEGIES FOR CHANGE

6. Imagine the Future



STRATEGIES FOR CHANGE

7. Clarify your Focus

	In Your Control	Not in Your Control
Take Action	<i>Effective Energy</i>	<i>Spinning Your Wheels</i>
Wait and See	<i>Missed Opportunity</i>	<i>Letting Go</i>

STRATEGIES FOR CHANGE

8. Reward Yourself



ANNOTATE

Which of these strategies do you think will be most helpful for you in the transition you are going through?

Recognize
Emotions

Sort Your
Losses

Create
Structure

Conduct a
Reality Check

Appreciate
What Was

Imagine
the Future

Clarify Your
Focus

Reward
Yourself

BEHAVIOR STYLE FOCUS

Controller

○ Results



BEHAVIOR STYLE NEEDS

Controller

- ☐ To be in control
- ☐ Options
- ☐ To make decisions
- ☐ Action and results



In Change

- ☐ Most active resisters if they disagree.
- ☐ Make sure expected results (high level) are clear.
- ☐ Quickly give them control over some aspect of the change so they can get results soon.

BEHAVIOR STYLE FOCUS

Controller

○ Results

Persuader

○ People



BEHAVIOR STYLE NEEDS

Persuader

- ☐ To be liked
- ☐ Recognition and praise
- ☐ To work with others
- ☐ Incentives



In Change

- ☐ Most vocal resisters if they disagree.
- ☐ Ask for their help getting others on board.
- ☐ Recognize them for being an early adopter.

BEHAVIOR STYLE FOCUS

Controller

○ Results

Persuader

○ People

Stabilizer

○ Relationships



BEHAVIOR STYLE NEEDS

Stabilizer

- ☐ Security
- ☐ Guarantees
- ☐ Agreement
- ☐ Appreciation



In Change

- ☐ Will focus on “how's” and the impact on others.
- ☐ Ask for their help in understanding how others are doing in the change process.
- ☐ Make sure it's clear what's not changing.

BEHAVIOR STYLE FOCUS

Controller

○ Results

Persuader

○ People

Stabilizer

○ Relationships

Analyzer

○ Quality, Accuracy, Perfection

A large, bold, blue capital letter 'A' is centered within a light gray square. The letter has a slight shadow effect, giving it a three-dimensional appearance as if it's floating above the square.

BEHAVIOR STYLE NEEDS

Analyzer

- ☐ To get it right
- ☐ Precision and accuracy
- ☐ Detailed explanations
- ☐ To know the rules



In Change

- ☐ They need to see reasons (i.e., data) for change.
- ☐ Need details on implementation plan.
- ☐ Ask them to help you identify “best practices” on navigating a change and potential pitfalls.

NEXT STEPS

- Use the Action Plan on page 19 in the workbook and write down two specific actions you will take to apply what you learned.
- Use your delegation plan to delegate what you identified.
- Select two of the eight strategies for managing change that you will implement for a current or upcoming change, and complete page 20 in the workbook.



Great work!



EFFECTIVENESS
INSTITUTE

