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# San Manuel University

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## **Learn 2 Lead: Effective People Management**

**Facilitator Guide (2024-12-20)**



<b>Section</b>	<b>Time</b>
<b>Welcome &amp; Introduction</b>	3 mins.
<b>Icebreaker Discussion: Covey's Big Rocks Analogy</b>	10 mins.
<b>Leading to Drive Results (Learning Objectives)</b>	7 mins.
<b>Activity: The Language of Leadership</b>	20 mins.
<b>Lecture: C.L.E.A.R. Expectations</b>	15 mins.
<b>Activity: Lost in Communication</b>	20 mins.
<b>Lecture: Communication Best Practices</b>	5 mins.
<b>Break</b>	10 mins.
<b>Activity: Time Management Tool Learn &amp; Share</b>	30 mins.
<b>Lecture: Prioritization – Balancing Importance and Urgency</b>	10 mins.
<b>Activity: Your Eisenhower Box</b>	25 mins.
<b>Discussion: Growing Your Delegation Mindset and Readiness Factors</b>	15 mins.
<b>Lecture: Delegation Levels and Purposeful Delegation</b>	10 mins.
<b>Lecture: Building a Delegation Plan</b>	10 mins.
<b>Activity: Delegation Scenarios</b>	25 mins.
<b>Activity: Your Delegation Plan</b>	10 mins.
<b>Reflection &amp; Closing</b>	5 mins.
<b>Total</b>	<b>240 mins. (4 hrs. 0 mins.)</b>

# Icebreaker Discussion: Covey's Big Rocks Analogy

Time	Visual	Preparation and Learning Outcomes
10 mins	<p style="text-align: center;">Show Slide #3</p>  <p style="text-align: center;">This slide has 9 steps of animation.</p>	<p><b>Desired Learning Outcomes:</b></p> <ul style="list-style-type: none"> <li>• Participants to know what is meant by Big Rocks, Pebbles, and Sand</li> <li>• Use this discussion as a primer to get participants thinking about how their effectiveness relates to the Tribe and Enterprise “big picture”</li> </ul>
Road Markers	Instructions and Talking Points	
 <p>Lecture</p>  <p>Participant Guide (p. 1)</p>  <p>Click to Animate</p> 	<p><b>Instructions:</b></p> <p>Stephen Covey is the author of <i>7 Habits of Highly Effective People</i> and many other leadership and motivational books. He would definitely have been considered a “thought leader” or influencer back in his day. He had an analogy about how what we choose to work on directly affects our effectiveness.</p> <p>There’s space for notes on page 1 of your participant’s guide.</p> <p>His analogy went something like this:</p> <p><b>Click to Animate: Left Jar</b></p> <ul style="list-style-type: none"> <li>• Encourage participants to take notes on page 1 of their Participant’s Guide</li> <li>• Think of a bowl or jar that represents all that we can accomplish in a timeframe, and we’re going to try and fit all our work in there             <ul style="list-style-type: none"> <li>○ After all, time is finite</li> <li>○ Think of the jar as representing a year’s worth of potential accomplishments</li> </ul> </li> </ul> <p><b>Click to Animate: Big Rocks, Pebbles, and Sand “bullet points”</b></p> <ul style="list-style-type: none"> <li>• Our most impactful pieces of work are represented by “Big Rocks”             <ul style="list-style-type: none"> <li>○ These are the small number of impactful things that must be accomplished to be successful, and their importance is indicated by their relative size</li> <li>○ Examples of Big Rocks are things like MBOs and key projects</li> </ul> </li> <li>• Our least impactful work is represented by sand             <ul style="list-style-type: none"> <li>○ This is work that needs to be done, but can be tedium, toil, or otherwise low-impact work in itself</li> <li>○ Each grain of sand is smaller and relatively less impactful than each rock, but they likely support your big rocks and pebbles</li> </ul> </li> <li>• For everything in-between, we have pebbles of various sizes</li> </ul>	

- These can be projects or ongoing tasks that have significance and support our big rocks

Using these pieces—the rocks, pebbles, and sand—we’re going to fill up our jar in a specific order.

The idea is this:

If you have a mindset where you begin with the low-impact things—represented by pouring our sand into the jar first...



Click to Animate

**Click to Animate: Pouring Sand into Left Jar**

the bowl will become nearly filled with all the sand, leaving barely any room to fit anything else. We can fit the pebbles on top of the sand...



**Click to Animate: Pouring Pebbles into Left Jar**

but it’s now impossible to squeeze the big rocks into the pebbles and sand—and it leaves no room for our Big Rocks.



**Click to Animate: Pouring Big Rocks into the Left Jar**

Unfortunately, what’s done is done. We spent all our focus on the sand, and we can’t take it out of the jar.

*In a way, the big rocks are in competition with gravel and sand! But we can only put one in first—we can only prioritize one!*

Alright—so let’s see what happens when we prioritize the big rocks now with a new jar.



Click to Animate

**Click to Animate: Right Jar**

If we put in our big rocks first, they all fit.



**Click to Animate: Pouring Big Rocks into the Right Jar**

Then, the Pebbles will fit between the Big Rocks,



**Click to Animate: Pouring Pebbles into the Right Jar**

and then the Sand will fit between the Pebbles.

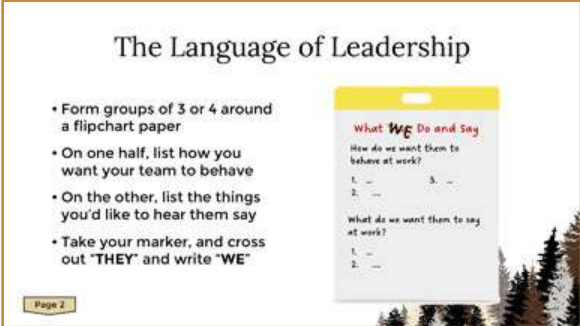






**Click to Animate: Pouring the Sand into the Right Jar**





The Sand, Pebbles, and Rocks are the same and in the same amount, but what was different was focusing on the Big Rocks first without being overwhelmed by the amount of Pebbles and Sand. I can promise you something: there will *always be plenty of Sand*, but your work effectiveness will be based on how you handle the Big Rocks and Pebbles.

While this a good concept, it’s an analogy and isn’t meant to be literal. The point is to have a mindset focused on Big Rocks—the big picture and overarching goals—because if we have a Sand mindset, then we’ll never get to the Pebbles or Big Rocks.


# Clear Communication

Activity: The Language of Leadership		
Time	Visual	Preparation and Learning Outcomes
10 mins	<p>Show Slide #5</p>  <p>This slide has animations</p>	<p><b>Desired Learning Outcomes:</b></p> <ul style="list-style-type: none"> <li>• Participants reflect on the skills related to the Language of Leadership.</li> <li>• Understand the importance of role modeling, and where there may be opportunities to improve role modeling</li> </ul>
Road Markers	Instructions and Talking Points	
 <p>Introduction</p>	<p><b>Say:</b></p> <p>Coming right out of our previous discussion, our heads should be filled with thoughts of how to effectively manage your team. With that as our backdrop, I want us to get into groups and discuss the things from our team members that we want to see them do, and hear they say... all with the intention that they would be more effective.</p>	
 <p>Group Activity</p>	<p><b>Instruct:</b></p> <ul style="list-style-type: none"> <li>• Have a prepared station for each group with a flipchart paper and marker, titled “What They Do and Say”; the flipchart should have the question “how do we want them to behave at work” on one half and the question “what do we want them to say at work” on the other half.</li> <li>• Have participants form groups of 3 or 4 (avoid groups larger than 4)</li> <li>• Give groups 5 minutes to brainstorm their answers to the two questions</li> <li>• After 5 minutes, continue with the below instruction:</li> </ul>	
 <p>Lecture</p>	<p>This is a bit of a twist—but should not be a shock. You should be holding yourself to the same behavior expectations as your team. This sets the foundation of mutual accountability within your team’s culture.</p> <p>To drive home this point, I want you to cross out the “they” on your group’s flipchart and write “WE” instead.</p>	
 <p>Click to Animate</p>	<p><b>Click to animate in the “WE” on the slide.</b></p> <p>With that said, I want to continue this as an individual reflection activity.</p> <p>I think it’s safe to say that the things on our flipcharts are there because your team members (some or all) are <i>not</i> acting in these ways.</p>	

# Using C.L.E.A.R. Expectations

Time	Visual	Preparation and Learning Outcomes
5 mins	<p style="text-align: center;">Show Slide #6</p> 	<p><b>Desired Learning Outcomes:</b></p> <ul style="list-style-type: none"> <li>• Learn the “CLEAR” model for sharing expectations with others</li> </ul>
Road Markers		Instructions and Talking Points
 <p>Introduction</p>  <p>Lecture</p>  <p>Participant Guide (p. 3)</p>	<p><b>Instructions:</b></p> <p>Our structure for setting expectations is called “CLEAR”, which is an acronym to remind us of what to include when we set expectations with our team members. You may feel like not all team members need to be given this level of detail, but doing so consistently will make sure you’re always understood. If an expectation was misunderstood, it’s likely because one of these 5 pieces was missing.</p> <p>These points are <i>not</i> in a specific order... it was just perfect that these could be arranged to spell “CLEAR”!</p> <ul style="list-style-type: none"> <li>• Encourage participants to take notes on page 3 of their participant guide as you cover each point.</li> <li>• C: Check-in Periodically             <ul style="list-style-type: none"> <li>○ Plan with your team member on when to have progress check-ins</li> <li>○ It’s your responsibility to ensure the project matches the vision, and catching a team member straying away from expectations early will keep a project on the right path</li> <li>○ Balance team member decisions with project requirements and scope; that is, empower them to make decisions whenever it’s reasonable to do so</li> </ul> </li> <li>• L: Listen for Barriers and Concerns             <ul style="list-style-type: none"> <li>○ During check-ins or the initial conversation, ask what barriers your team member foresees with completing the expectation and use your management power to remove barriers as appropriate</li> <li>○ Seek to understand your team member’s concerns with the project—not just the outright barriers—because our professionals probably know the team’s day-to-day work better than we do</li> </ul> </li> </ul>	

# Time Management and Prioritization

Activity: Time Management Tool Learn & Share		
Time	Visual	Preparation and Learning Outcomes
30 mins	<p>Show Slides #11 – 12</p> <div style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center;"><b>Time Management Methods</b></p> <ul style="list-style-type: none"> <li>• Split participants into groups of 4</li> <li>• Groups will receive a study guide for a time management method</li> <li>• Within your group, study your job aid and become experts!</li> <li>• Ask each other questions to better understand it, avoid asking the facilitator                             <ul style="list-style-type: none"> <li>• Why and how would you use it?</li> <li>• What are its strengths?</li> <li>• What type of worker/role would benefit from it the most?</li> </ul> </li> </ul> </div> <div style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;"><b>Time Management Tools: Share Out</b></p> <ol style="list-style-type: none"> <li>1. Split your group of 4 into two pairs</li> <li>2. Find a pair that specialized in the <i>other</i> time management tool</li> <li>3. You have 15 minutes to take turns teaching each other</li> </ol> </div>	<p><b>Desired Learning Outcomes:</b></p> <ul style="list-style-type: none"> <li>• Participants will know two different time management methods that they can use for themselves and their team members</li> <li>• Participants will know how to teach time management tools to others (like their team members).</li> </ul>
Road Markers	Instructions and Talking Points	
 <p>Lecture</p>	<p><b>Instructions:</b></p> <p>Part of being a manager is getting fair value out of our team members’ time—making sure they’re productive. Sometimes a team member either doesn’t know that they need time management as a skill, or they understand it’s important but just don’t know how. In the long run, it can be beneficial to guide them and share ways they can manage their time.</p> <p>To help you develop a team member’s time management skills or give them a time management system to follow, I’m going to pass out a job aid for one of two time management tools to each group. You’ll become an expert on the time management method you receive, before sharing what you know with a group who became experts on the other method.</p> <ul style="list-style-type: none"> <li>• Split participants into an even number of pairs or groups of 4             <ul style="list-style-type: none"> <li>○ It’s important that there’s an even number of groups</li> <li>○ One group of 5 is fine if it means there’s an even number of groups</li> </ul> </li> <li>• Give each pair / group a job for either Gates’s 4-Block or the 1-3-5 To-Do List             <ul style="list-style-type: none"> <li>○ Bill Gates’s “4 Bucket” technique                 <ul style="list-style-type: none"> <li>▪ A calendar blocking technique where a person focuses on only on their 4 most important pieces of work and treats them as buckets.</li> <li>▪ Each piece of work should take on average 25% of the total working time each day and be color-coded.</li> </ul> </li> </ul> </li> </ul>	



Participant Guide (p. 6)



Next Slide

- Great for more strategic leaders, like directors and above, because they can see at-a-glance the small number of big projects they're working towards.
- If they don't see a specific color-coded item on their calendar for the week, they need to make time for it.
- 1-3-5 To-Do List
  - A list making technique where a person tries to complete 1 "big" thing, 3 "medium" things, and 5 "small" things in their day
  - These terms can mean different things: they can line up with your "Big Rocks", or the "big" things can just take the most time
  - Can lend itself for use by more tactical employees, because of the focus on specific tasks
  - Uses priority as a major factor, as the list can change daily
- Allow groups about 10 minutes to study their assigned time management tool
- As they work in their group, they should think about these questions:
  - How is it best used?
  - What are its strengths?
  - What types of roles might use it best?
- After 10 minutes, the activity switches to a "Share Out" where groups will split and teach other's their time management method

**Advance to the Next Slide.**

- Have groups split into pairs, and have them find another pair that learned about the *other* time management tool (the graphic kind of shows this)
- Ideally, pairs will take turns sharing the method with each other
- Participants can take notes on the new time management method on page 6 of their participant guides
- Give participants about 20 minutes to share the methods with each other

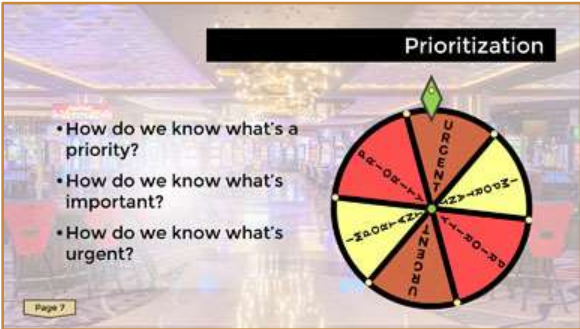






Discussion






**Debrief / Discussion:**

- How was it learning about a new way to manage your time with a partner?
- How will one of these tools make you more able to manage your time and the time of your team members?
- What do you feel was the benefit to teaching each other time management tools?

## Proper Prioritization: Importance and Urgency

Time	Visual	Preparation and Learning Outcomes
10 mins	<p data-bbox="493 254 743 281">Show Slides #13 – 15</p>  <p data-bbox="415 623 824 651">This slide has multiple animations.</p>  <p data-bbox="407 993 833 1020">This slide begins with an animation.</p>  <p data-bbox="407 1362 833 1390">This slide begins with an animation.</p>	<p data-bbox="967 254 1312 281"><b>Desired Learning Outcomes:</b></p> <ul data-bbox="997 300 1523 583" style="list-style-type: none"> <li>• Understand the terms Prioritization, Importance, and Urgent</li> <li>• Know examples of Urgency / Importance “traps”</li> <li>• Share how Urgency can be good, which is a concept used in the Delegation section</li> </ul>
Road Markers	Instructions and Talking Points	
 <p data-bbox="144 1677 237 1705">Lecture</p>  <p data-bbox="121 1925 259 1990">Participant Guide (p. 7)</p>	<p data-bbox="302 1480 451 1507"><b>Instructions:</b></p> <p data-bbox="306 1547 1468 1661">Prioritization is an important part of time management and making an impact (connect this to big rocks). It’s strategically important because we need to spend most of our time on the most <i>important</i> work and tactically important because we need to get the most <i>urgent</i> stuff done first.</p> <p data-bbox="306 1698 1458 1770">We’re going to use those two terms quite a bit in this section: <i>important</i> and <i>urgent</i>. We need to consider Importance and Urgency together so we can decide what to spend our time on.</p> <p data-bbox="306 1787 1495 1814">Remember—strategic decisions around time management are the responsibility of the team leader.</p> <p data-bbox="306 1852 1474 1879">By <i>important</i>, we mean the work that is core to being effective at your job—your business impact.</p> <p data-bbox="306 1896 1500 1967">For a director, important tasks could be strategic planning and coordination of your teams to meet a large enterprise goal. For a food server, important tasks could be waiting tables and maintaining</p>	

# Activity: My Eisenhower Box

Time	Visual	Preparation and Learning Outcomes
20 mins	<p style="text-align: center;">Show Slide #16 – 17</p> <div style="text-align: center;">  <p>This slide has 4 steps of animation.</p>  <p>This slide has automatic animation.</p> </div>	<p><b>Desired Learning Outcomes:</b></p> <ul style="list-style-type: none"> <li>• Better understand the Eisenhower Box using an example.</li> <li>• Participants will use the Eisenhower Box to sort their current tasks or projects.</li> <li>• Identify at least one task or project they can delegate (using the box), which they will use for a later activity.</li> <li>• Use the Eisenhower Box to overcome the Urgency and Importance traps discussed earlier</li> </ul>
Road Markers	Instructions and Talking Points	
<div style="text-align: center;">  <p>Lecture</p> </div> <div style="text-align: center;">  <p>Participant Guide (p. 8)</p> </div> <div style="text-align: center;">  <p>Click to Animate</p> </div>	<p><b>Instructions:</b></p> <p>To help you prioritize your work and overcome the traps I just shared, I’d like to introduce a tool called the Eisenhower Box. The tool evolved out of a quote Dwight Eisenhower popularized before he was president, based on how he tackled his work as a very, very busy person.</p> <p>The model has since evolved from the original concept, and now we understand that Urgency and Importance can form the two axes of a grid. Urgency is on the left side, with a divider to separate Low and High Urgency work. Importance is at the bottom, with a divider to separate Low and High Importance work.</p> <p>We’ve already covered what we mean by those terms, so let’s go over each of the 4 boxes created by the grid.</p> <ul style="list-style-type: none"> <li>• Instruct participants to take notes on page 8 of their Participant Guide.</li> <li>• Click to animate each quadrant and explain each; optional examples are provided to help clarify for participants</li> <li>• Delete             <ul style="list-style-type: none"> <li>○ Tasks that are low urgency and low importance fit here.</li> <li>○ That is, things that don’t need to be done “now” and have little to no business impact</li> <li>○ Ask participants for examples of some things that would fit in this box for them (or managers in general).</li> </ul> </li> </ul>	



- Decide
  - Tasks that are low urgency and high importance fit here.
  - The term “Decide” refers to the need to the need to Decide when to do them.
  - Ask participants for examples.
- Delegate
  - Tasks that are considered high urgency and low importance fit here.
  - Ask participants for examples.
- Do (it now!)
  - Tasks that are considered high urgency and high importance fit here.
  - In a situation like this, there’s no one more capable or
  - Ask participants for examples.
- Before continuing to the discussion, check for understanding and answer questions.

Where you place tasks on your grid will depend on your judgement. The better you understand your team and its strategic goals, the better informed your judgement and the more accurate your Eisenhower Box—and priorities—will be. If you don’t have any idea of your team or cost center’s priorities, or what’s important and urgent, you will not be successful at using the Eisenhower Box.

**Click to advance the slide.**



Next Slide

- Example: Learning & Development Sr. Training Specialist
- Delete
  - Recap what Delete means
  - Notice that potential timewasters are in here, and they are not unique to me
  - Speak to the list of tasks in the box, more in general and not each individual item
- Decide
  - Recap what Decide means
  - Speak to the list of tasks in the box
- Delegate
  - Recap what Decide means
  - Speak to the list of tasks in the box
- Do
  - Recap what Do means
  - Speak to the list of tasks in the box

With that example fresh in our minds, we’re all going to practice. Turn to the blank Eisenhower Box on page 9 of your Participant Guide. Take about 10 minutes to fill the grid with your key tasks or projects. Target having 3 items in each part of the grid.

- Check for understanding and answer questions from participants. If necessary, review the definitions of Urgent and Important.
- At the end of about 10 minutes, bring the room back together to continue to the peer-sharing part of the activity.

Now that we have our grids filled out, let’s get into pairs. Share a few items from your Decide, Delegate, and Delete boxes with a brief explanation as to why you put each item in that box.

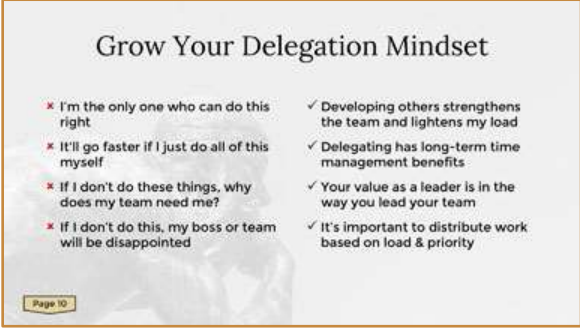




Solo Activity




Participant Guide (p. 9)

# Effective Delegation

Lecture: Grow Your Delegation Mindset		
Time	Visual	Preparation and Learning Outcomes
5 mins	<p>Show Slide #18</p> 	<p><b>Desired Learning Outcomes:</b></p> <ul style="list-style-type: none"> <li>• Understand that Delegation is a critical part of people management</li> <li>• Like Urgency, Micromanagement shouldn't always be viewed negatively</li> <li>• Know that Micromanagement and Delegation are opposites</li> <li>• Participants to share stories about how they overcame a Barrier</li> </ul>
Road Markers	Instructions and Talking Points	
 <p>Lecture</p>	<p><b>Instructions:</b></p> <p>In our discussions about time management, we decided that Urgency was a bit of a mixed bag.</p> <ul style="list-style-type: none"> <li>• We decided that Urgency isn't <i>always</i> bad, it depends on how Urgency is used (but tricks and traps like Urgency Dilution are always bad)</li> <li>• For example, we discussed how Urgency is effective when we need to react quickly, but not when we need to reflect</li> </ul> <p>Balance is a good starting point, but the goal is to develop the <b>Mental Agility</b> (an EI term) to build the decision-making skills to choose the most effective behavior for the situation at the time—push Urgency when it's needed, but step back and let the team breathe, or even lead with their expertise, when it makes sense.</p> <p>Urgency and Micromanagement are so similar in this way that it might be surprising. Like Urgency, Micromanagement has its benefits.</p> <ul style="list-style-type: none"> <li>• Ask participants to share some of their perceived benefits of Micromanagement <ul style="list-style-type: none"> <li>○ It can be quicker to guide a team member's work</li> <li>○ There can be reduced mistakes</li> <li>○ Structured workflow, with direct overview by a manager</li> </ul> </li> <li>• Then ask participants to share their perceived disadvantages of Micromanagement <ul style="list-style-type: none"> <li>○ No innovation—only the manager's way is considered</li> <li>○ No team empowerment—very controlled and confined work environment</li> <li>○ Workers are unable to work without the direction of their leader</li> </ul> </li> </ul> <p>Given the focus of this course, we're not going to dwell on Micromanagement. Just like Urgency, Micromanagement should <i>not</i> be our default setting—it's a panic response, and its long-term effectiveness is limited.</p>	
 <p>Discussion</p>		

# Lecture: Purposeful Delegation

Time	Visual	Preparation and Learning Outcomes
10 mins	<p>Show Slide #21</p> 	<p><b>Desired Learning Outcomes:</b></p> <ul style="list-style-type: none"> <li>• Understand the three primary reasons to delegate and the benefit of each</li> <li>• Have participants share specific examples of what “Strength” and “Stretch” delegation looks on their team (or could look like)</li> </ul>

## Road Markers Instructions and Talking Points



Lecture



Participant Guide (p. 12)



Click to Animate



Click to Animate

**Instructions:**

This brings us to the topic of Purposeful Delegation. I like to use the term “Purposeful” because it points out the deliberate, thoughtful, and strategic reasons we delegate things to team members.

Yes, “it needs to get done” is a reason to delegate, but that doesn’t mean we can’t put some thought behind it. And there are other reasons leaders delegate too!

- There’s space to take notes on Page 12 of the Participant Guide.
- Workload management is that type of situation where work “just needs to get done”,
- For example:
  - Consider your personal workload and the workload of your team members
  - It’s impossible for a leader to handle an entire team’s workload—it’s not possible to pull every report, speak to every customer, or deal with every issue personally
  - I like to think of this as the “Sanity” part of delegation for this reason, purposeful balancing of the team’s workload will keep *everyone* sane




**Click to Animate: “Sanity” Callout**

- That said, even work that “just needs to get done” could be delegated thoughtfully—by leaning on the next reasons.
- The next reason, which requires our leaders to be a bit more purposeful, is Utilizing Team Strengths
  - There will be times where a leader will need to delegate something because a team member has a specific skill or a strength

**Click to Animate: “Strength” Callout**

- This strength can be used to complete the task quickly, at an expected level of quality or standard, and perhaps to meet a certain cost
- To delegate this way, you’ll need to know the skills and strengths of your team members to make the best decisions

## Activity: Delegation Scenarios

Time	Visual	Preparation and Learning Outcomes
30 mins	<p style="text-align: center;">Show Slide #23 – 24</p> <div style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center;"><b>Delegation Scenarios</b></p> <ul style="list-style-type: none"> <li>• Form into groups of 3</li> <li>• The facilitator will provide a scenario with tasks a leader needs to delegate</li> <li>• Use a Delegation Plan worksheet</li> <li>• Share the decision and have a discussion?</li> <li>• Consider the Readiness Factors in the scenarios                             <ul style="list-style-type: none"> <li>• What are the relevant Readiness Factors for this situation?</li> <li>• How does your team members meet or need to meet the expected level of readiness?</li> </ul> </li> <li>• Decisions based on Stretch vs Strength</li> </ul> <p style="font-size: small; margin-top: 5px;">Page 17</p> </div> <div style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;"><b>Your Delegation Plan</b></p> <ul style="list-style-type: none"> <li>• Return to your Eisenhower Box on page 9</li> <li>• You should have a list of projects to <b>Delegate</b> ready!</li> <li>• Pick one and build a delegation plan                             <ul style="list-style-type: none"> <li>• Break it down into tasks, each with a Delegation Level</li> <li>• Match tasks to Team Members, using Purpose and Readiness</li> <li>• Draft the critical CLEAR Expectations for each task</li> </ul> </li> <li>• When finished, pair up and share your plan</li> </ul> </div>	<p><b>Desired Learning Outcomes:</b></p> <ul style="list-style-type: none"> <li>• Practice using the Delegation Plan worksheet</li> <li>• Practice deciding on how to delegate work based in given situations</li> <li>• Practice delegating work to a team member based on their Eisenhower Box from earlier</li> </ul>
<b>Road Markers</b>	<b>Instructions and Talking Points</b>	
<div style="text-align: center; margin-bottom: 20px;">               Activity Prep         </div> <div style="text-align: center; margin-bottom: 20px;">               Group Activity         </div> <div style="text-align: center;">               Participant Guide (p. 13)         </div>	<p><b>Activity Prep:</b></p> <ul style="list-style-type: none"> <li>• Use a set of scenarios that is relevant to the departments attending the training             <ul style="list-style-type: none"> <li>○ View the list of enrollments in Workday</li> <li>○ Find trends in the departments, teams, or cost centers of the enrollees</li> <li>○ Pick out and print scenarios from the master file that match those trends</li> <li>○ Work with department leaders or people services to get new scenarios as needed</li> <li>○ A small number of “silly” delegation scenarios are available</li> </ul> </li> </ul> <p><b>Instructions:</b></p> <ul style="list-style-type: none"> <li>• Have participants get into pairs; if possible, have them pair with someone that’s on their team or familiar with their team members             <ul style="list-style-type: none"> <li>○ If there’s not a lot of opportunity for pairs, consider having them do it solo</li> </ul> </li> <li>• Pass out a scenario to each pair that is like their team’s work, unless you plan to use the “silly” scenarios</li> <li>• Read the scenario thoroughly in your group to understand the task and context</li> <li>• Make key delegation decisions with the help of the Delegation Plan worksheet (the blank sheets start on page 13 of their participant’s guide)</li> <li>• The key points are to:             <ul style="list-style-type: none"> <li>○ Make good decisions around Purposeful Delegation</li> <li>○ Make good decisions around Delegation Level</li> <li>○ Make good decisions matching team members to tasks...</li> </ul> </li> </ul>	