

The Five Dynamics of Effective Delegation

Recast Leadership Cohort

Monday, October 21, 2024



RECAST SOFTWARE

 **BILL ZIPP**

Recast Leadership Cohort

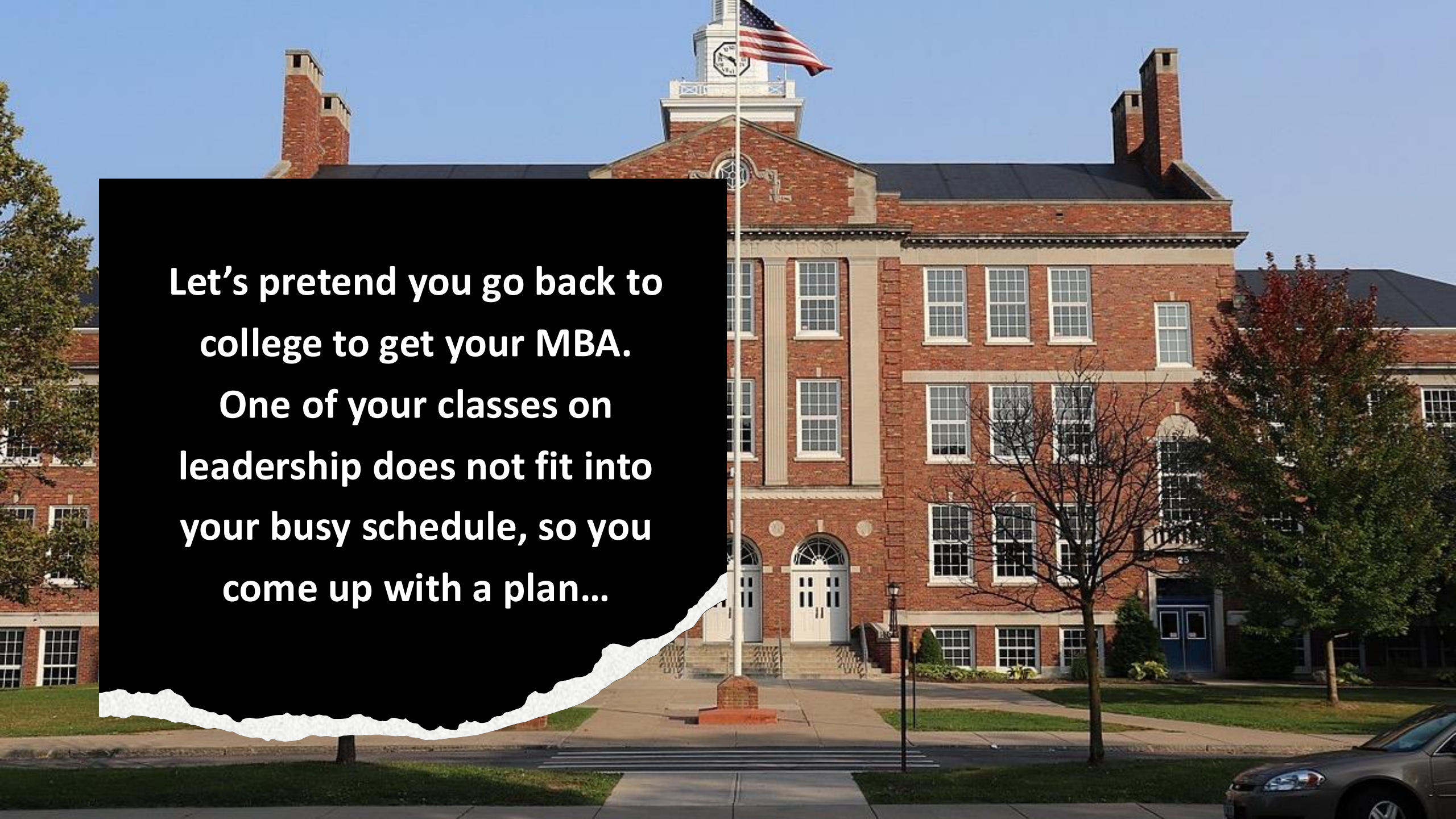
Group Meetings *Monthly*

Focused on a critical leadership topic, like executive presence, one-on-ones, team member motivation. Each topic has field work flowing from the group session.

One-on-One Coaching *After Group Meetings*

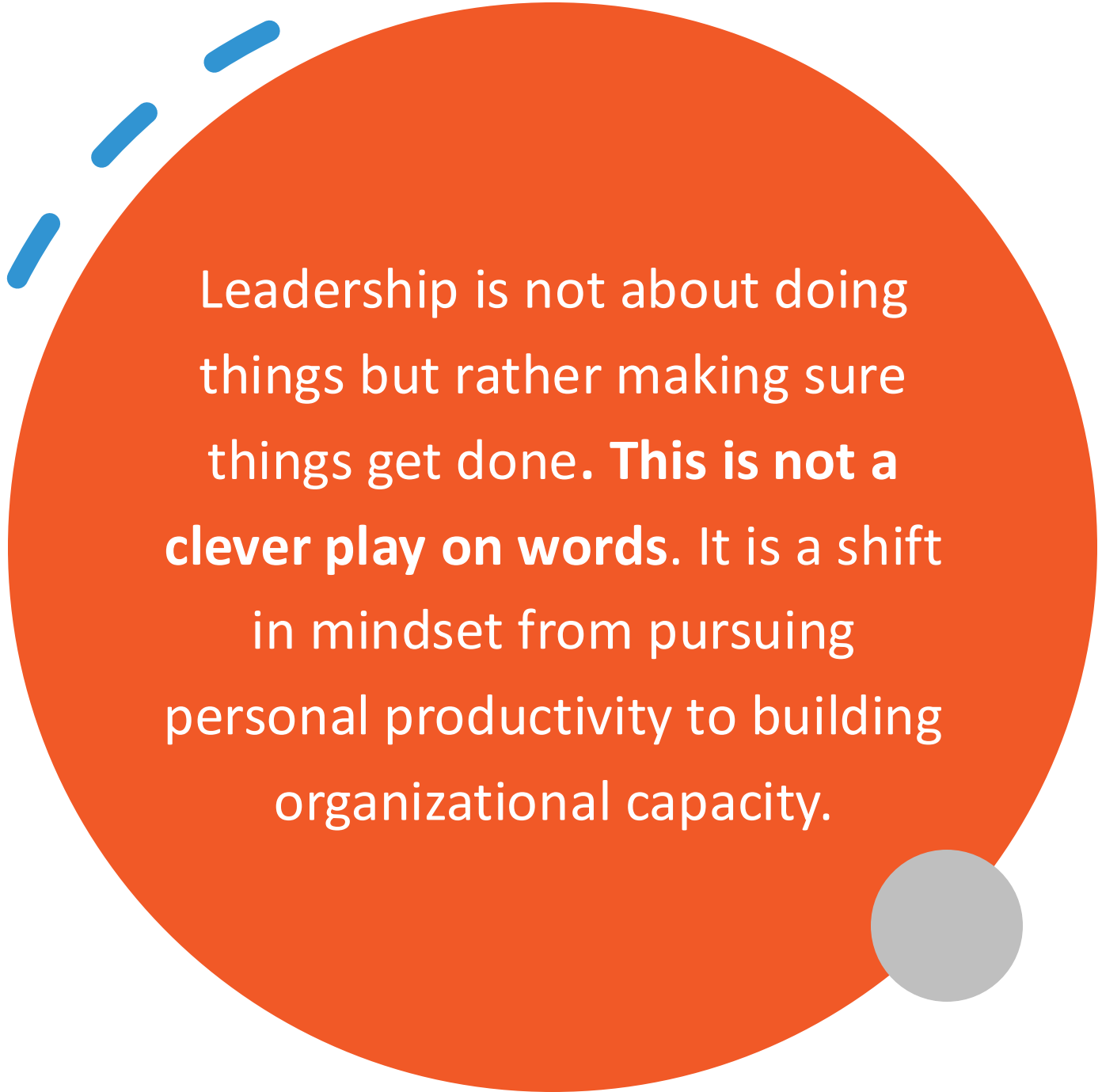
Focused on applying the content of our group meetings to your specific context and individually working through the field work that is assigned in the group meeting.

Three ADDITIONAL Cohort Sessions: Monday, October 21; Monday, November 18; Monday, December 16 all at 1:00 PM Pacific



Let's pretend you go back to college to get your MBA.

One of your classes on leadership does not fit into your busy schedule, so you come up with a plan...



Leadership is not about doing things but rather making sure things get done. **This is not a clever play on words.** It is a shift in mindset from pursuing personal productivity to building organizational capacity.

The Dynamics of Effective Delegation

- 1 . Delegation is a process not an event.
- 2 . Delegation aligns talent to the task at hand.
- 3 . Delegation clarifies the authority being delegated.
- 4 . Delegation always agrees on a due date.
- 5 . Delegation follows through consistently.

Stages of Delegation

I do.

You do.

Stages of Delegation

I do.

I do, you watch.

We do.

You do, I watch.

You do.

Stages of Delegation

I do.

Realization

I do, you watch.

We do.

You do, I watch.

You do.

Stages of Delegation

I do.

Realization

I do, you watch.

Observation

We do.

You do, I watch.

You do.

Stages of Delegation

I do.

Realization

I do, you watch.

Observation

We do.

Collaboration

You do, I watch.

You do.

Stages of Delegation

I do.	<i>Realization</i>
I do, you watch.	<i>Observation</i>
We do.	<i>Collaboration</i>
You do, I watch.	<i>Evaluation</i>
You do.	

Stages of Delegation

I do.	<i>Realization</i>
I do, you watch.	<i>Observation</i>
We do.	<i>Collaboration</i>
You do, I watch.	<i>Evaluation</i>
You do.	<i>Delegation</i>

Pilot

Pilot and Copilot

Copilot and Pilot

Copilot



The Dynamics of Effective Delegation

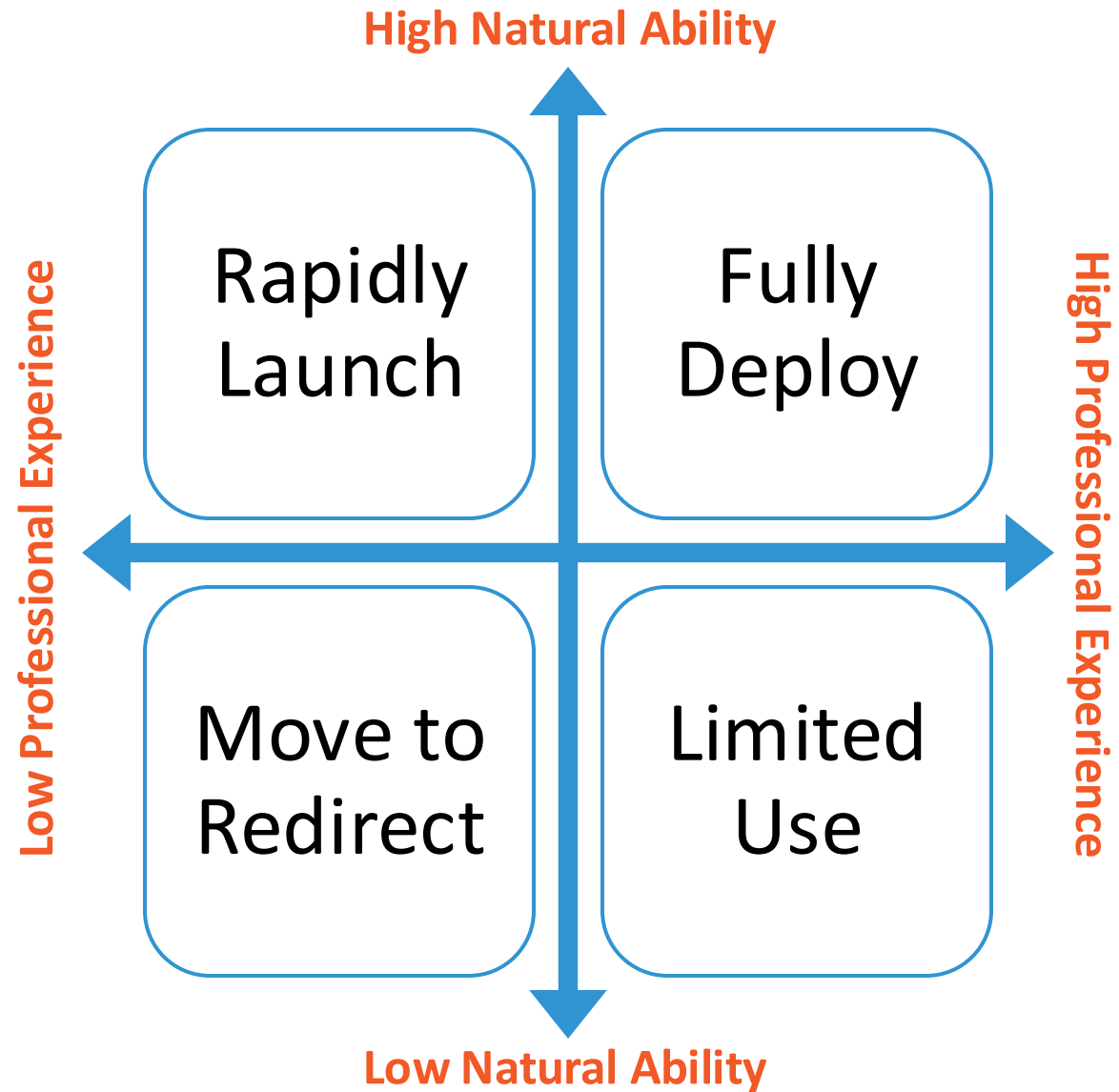
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Square Peg, Round Hole

Forcing a square peg to fit in a round hole not only damages the peg, the person being delegated to, but also damages the hole, the job being done and organizational results.



Effective Delegation Filter



The Dynamics of Effective Delegation

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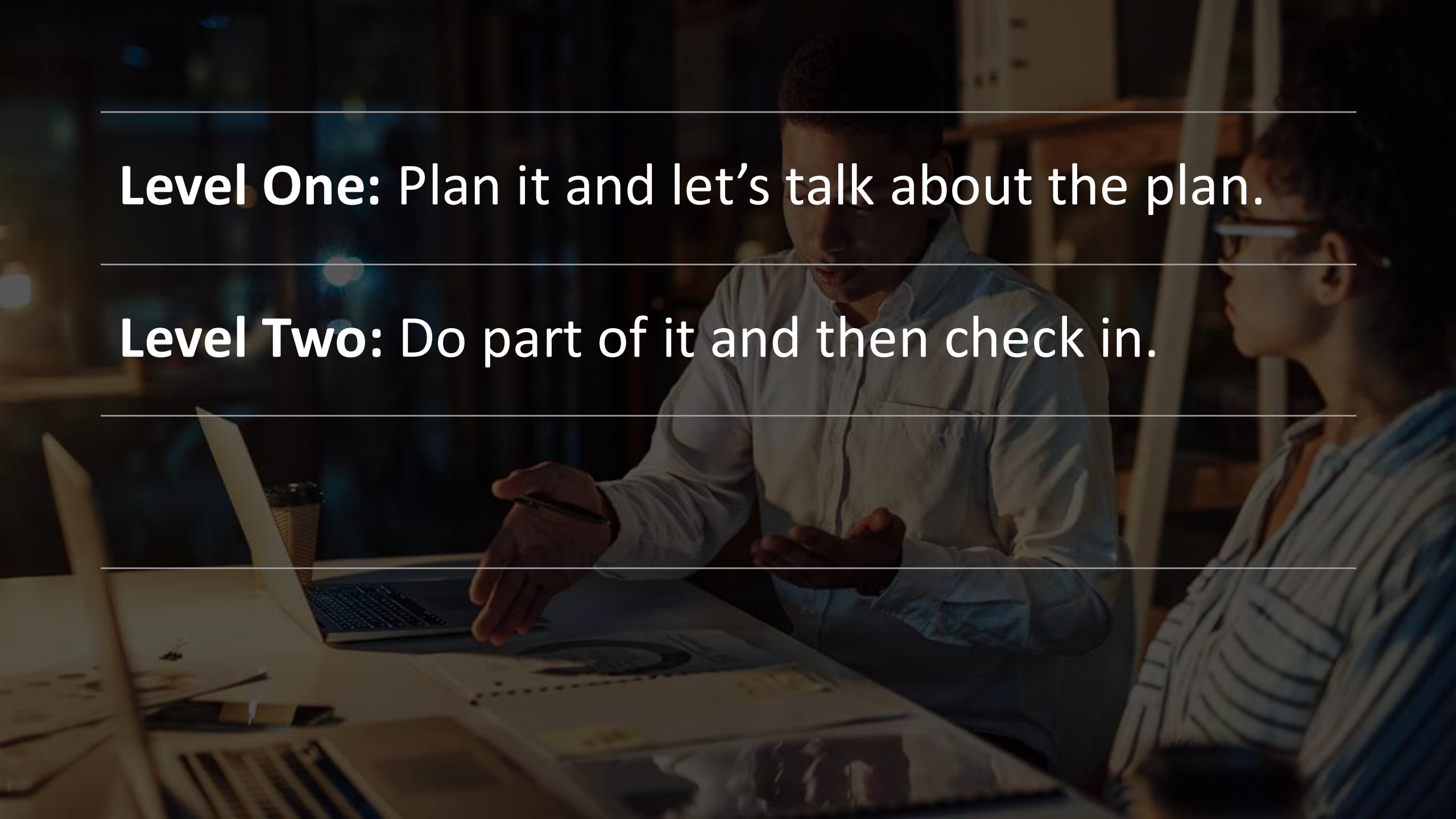


Level One: Plan it and let's talk about the plan.

A man in a white shirt and a woman in a striped shirt are sitting at a desk in a dimly lit office. The man is pointing at a document on the desk, and the woman is looking at it. There are laptops and a coffee cup on the desk. The background is dark with some blurred lights.

Level One: Plan it and let's talk about the plan.

Level Two: Do part of it and then check in.



A man and a woman are sitting at a desk in a dimly lit office. The man is pointing at a laptop screen while the woman looks on. There are papers and another laptop on the desk. The background is dark with some blurred lights.

Level One: Plan it and let's talk about the plan.

Level Two: Do part of it and then check in.

Level Three: Do it and let me know what you did.

A man and a woman are sitting at a desk in a dimly lit office. The man is pointing at a laptop screen while the woman looks on. The background is dark with some blurred lights.

Level One: Plan it and let's talk about the plan.

Level Two: Do part of it and then check in.

Level Three: Do it and let me know what you did.

Level Four: Just do it.

The Dynamics of Effective Delegation

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- 4 . **Delegation always agrees on a due date.**
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**Clear
delegation
due dates
accelerate
performance,
clarify
expectations,
and allow for
deadline
negotiation.**





Delegation Discipline

Always answer this question:

WHO is going to do WHAT **by**
WHEN?

The Dynamics of Effective Delegation

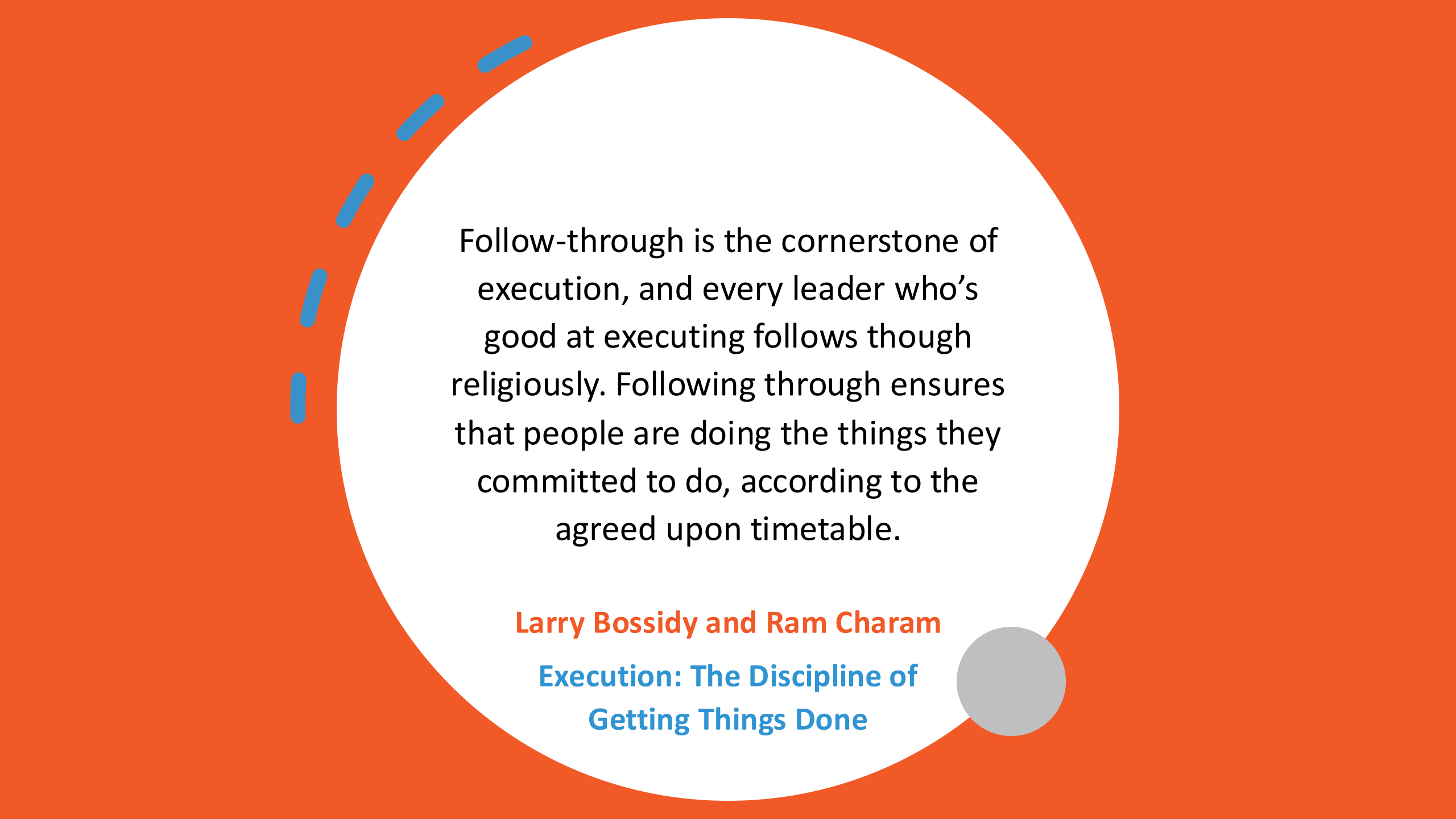
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This is what most of us think when we hear the word accountability, someone in our face, pushing us in a way that's super uncomfortable, if not downright offensive.





Make Hard Fun



Follow-through is the cornerstone of execution, and every leader who's good at executing follows through religiously. Following through ensures that people are doing the things they committed to do, according to the agreed upon timetable.

Larry Bossidy and Ram Charan

**Execution: The Discipline of
Getting Things Done**

Scenario

o One

Meagan has asked Thomas to complete a training deck to onboard new customers in using Recast's enhanced right click tools. Thomas prepares the deck then sends it out to the client success team with the email, "Here's your new onboarding deck!" The client success team is not happy about these changes.

Which delegation dynamic has been missed?

- Process not an event
- Alignment of talent to task
- Level of authority clarified
- Due date agreed on
- Consistent follow-up

Scenario

○ Two

Craig keeps missing his sales number month after month. Deals fall apart, push to the next month, or never even get going in the first place. In spite of intensive training, he's not any good at prospecting or securing first appointments. He works really, really hard but nothing happens as a result.

Which delegation dynamic has been missed?

- Process not an event
- Alignment of talent to task
- Level of authority clarified
- Due date agreed on
- Consistent follow-up

Scenario Three

Derek has asked Amy to prepare a pipeline report for next month's QBR. Amy has never prepared a pipeline report and hasn't even attended a QBR at Recast. She doesn't know where to begin, so puts off doing it until the last minute and it doesn't get done the way Derek wants it. He's now super frustrated with her.

Which delegation dynamic has been missed?

- Process not an event
- Alignment of talent to task
- Level of authority clarified
- Due date agreed on
- Consistent follow-up

Scenario Four

Susan has asked Angela to work on a new process that will populate MQLs in Salesforce so reps can immediately begin working on them. This is a big project with lots of moving parts and cross-functional collaborators, due by the end of the fiscal. After giving the assignment, Susan has not talked with her about it again and Angela is wondering if it's still a priority.

Which delegation dynamic has been missed?

- Process not an event
- Alignment of talent to task
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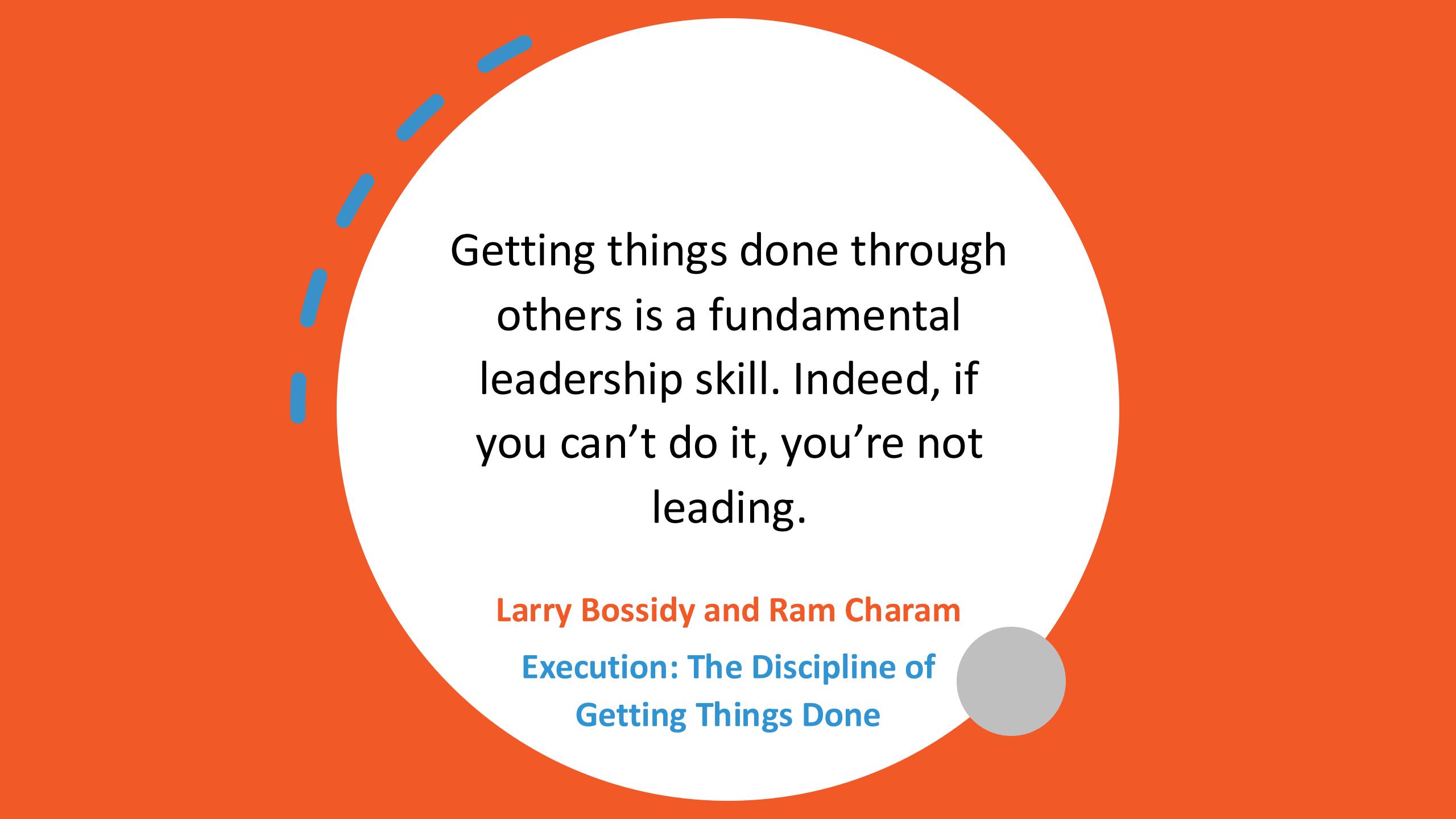
Scenario

Five

Ben has asked Travis to participate in evaluating Recast's sales commission and bonus structure. Travis is to review and evaluate three compensation plans and come back to Ben with his recommendations. Unfortunately, it's also the end of the quarter and Travis is working hard to close deals. Ben sends him an email on the last day of the month asking for his recommendations and is super disappointed it isn't done.

Which delegation dynamic has been missed?

- Process not an event
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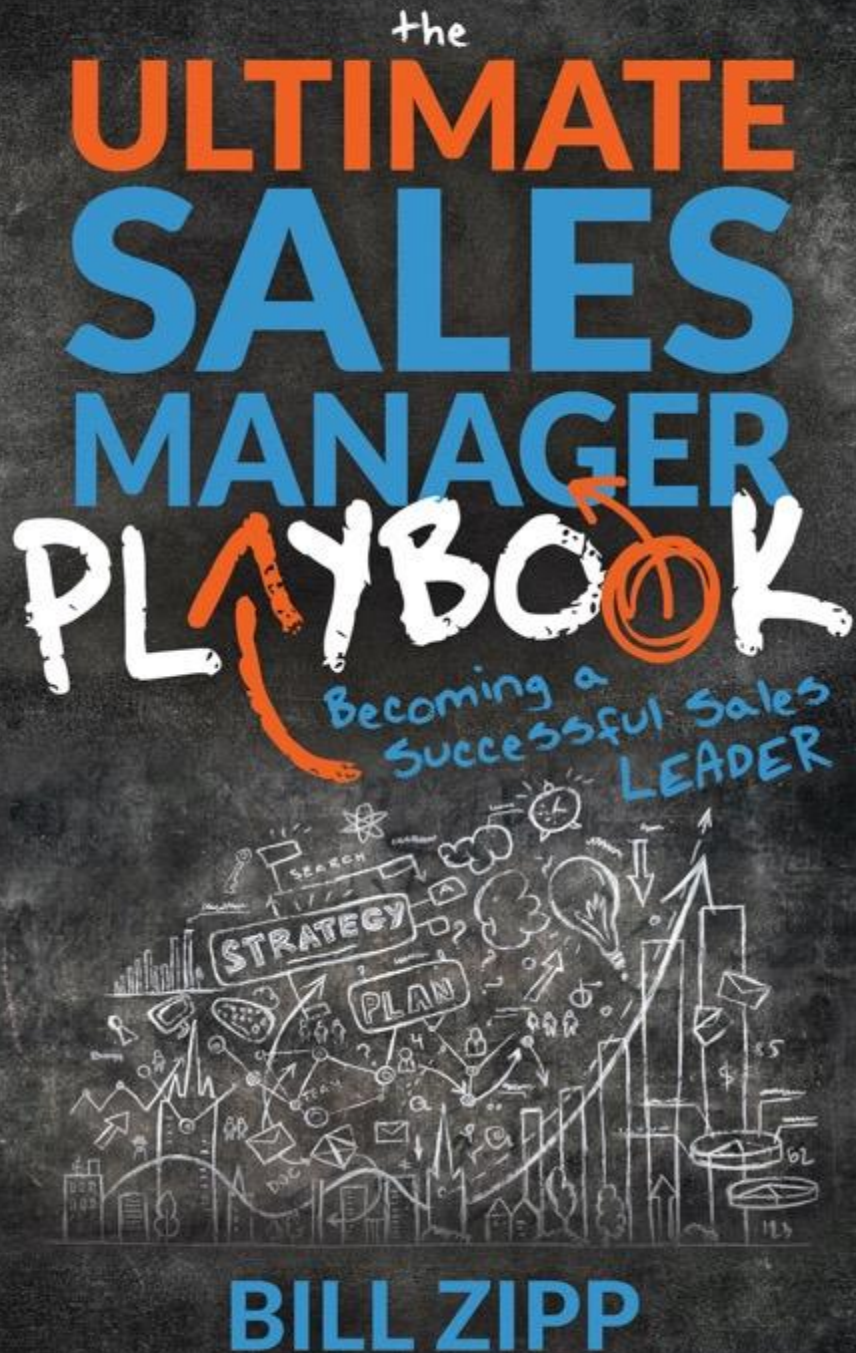


Getting things done through others is a fundamental leadership skill. Indeed, if you can't do it, you're not leading.

Larry Bossidy and Ram Charam

Execution: The Discipline of Getting Things Done





Recast Leadership Cohort

Monday, October 21, November 18, and December 16

Do these three things:

1. Complete your Google Forms Delegation Dynamics assignment.
2. Schedule your coaching session with Bill via Calendly.
3. Share your Delegation Dynamics assignment with someone you trust.

Your Dedicated Web Resource Page:

<https://billzipp.com/recastleadershipcohort/>



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