

**A sample activity from the
Fenman trainer's resource:**

The Essentials of Management

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Thank you for downloading this sample activity. You are welcome to use this material in your courses.

This sample activity is just one of 20 contained in the trainer's activity pack '*The Essentials of Management*', published by Fenman. Details of the other activities are given at the end of this document.

The Essentials of Management

Contents:

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- About this resource

Introduction:

When you're looking for ideas to enhance your management development workshops - or even revamping your entire programme - everything you need is here in this trainer's activity pack.

The Essentials of Management is your one-stop goldmine for training activities in all the core 'essentials'.

There are times when you don't need an entire pack dedicated to 'meetings' or 'performance appraisals' or 'leadership' or 'motivating the team' or 'time management'; but often you do need a session on a particular subject, as part of a much broader management development programme. That's when you'll turn to this pack – again and again.

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- appraisal interviewing
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ACTIVITY 5

MANAGING TIME

AND DELEGATION

FOR PREVIEW ONLY

PURPOSE

To introduce participants to the techniques and give them an opportunity to develop the skills required to manage their time and delegate effectively in order to achieve their work priorities.

ACTIVITY 5

MANAGING TIME

AND DELEGATION

PURPOSE

How do I identify priority tasks and who will tackle them?

To introduce participants to the techniques and give them the opportunity to develop the skills required to manage their time and delegate effectively in order to achieve their work priorities.

APPLICATION

This activity forms an integral part of any programme that aims to develop management skills. It is applicable on a wide range of management and supervisory skills programmes. It has also been used on individual courses in Time Management, Stress Management, Assertion and Personal Effectiveness.

The activity has been designed so that it can stand alone, but will be more effective when used in conjunction with *Activity 2 Oriented to the future* and *Activity 3 Planning the future*.

WHAT HAPPENS

You start the session by introducing the participants to one of the basic concepts of effective time management – identifying your priority tasks.

The participants then take part in an exercise that helps them to identify their top priorities and establish less important tasks which can either be delegated or delayed.

Following a group exercise on the benefits and typical objections to delegation, you lead a discussion on what is required to delegate effectively at work.

This is followed by a role-play during which they have the opportunity to put the identified skills into practice.

The activity concludes with a learning review, during which the participants make a key-point summary emphasising how they can manage their time more effectively at work.

TIME

Overall time required: 3 hours 10 minutes (3 hours 50 minutes if additional work on objectives is required)

- Introduction: 20 minutes (1 hour if participants haven't previously completed the objective setting exercise in *Activity 2 Oriented to the future*)
- Develop a daily 'to-do' list: 20 minutes
- Distinguish between important and urgent: 30 minutes
- Decide how to spend your time: 20 minutes
- Delegate effectively: 30 minutes
- Delegation role-play: 1 hour
- Learning review and summary: 10 minutes

MATERIALS & RESOURCES

- 6 OHT masters:
 - 5.1 *Time management*
 - 5.2 *What is management?*
 - 5.3 *Ground rules for 'to-do' lists*
 - 5.4 *The priority grid*
 - 5.5 *What's the best use of my time right now?*
 - 5.6 *Delegation ground rules*
- 2 Handout masters:
 - 5.7 *Delegation ground rules*
 - 5.8 *Delegation exercise briefing*
- Overhead projector and screen
- Flipchart and stand (or acetate if preferred)
- Marker pens for trainer
- Paper and pens for participants
- Space for undisturbed small-group work
- Wall, screens or a whiteboard for display
- Tape, Blu-Tack® or pins

IN PREPARATION

If possible give the participants advance notice that they will be required to think of a suitable task to use to practise delegating to a member of their staff. Ask them to bring to the activity any necessary information, props or equipment.

INTRODUCTION



Show OHT 5.1 *Time management*

Ask the participants if they ever think they just don't have enough time. Do they chase around in all directions, and the faster they rush the less they seem to get done? At the end of the day do they find that there is still more work to do? Do they wonder 'What have I achieved today? Where did all my time go?'.
FOR PREVIEW ONLY

Point out that they are not alone. In most modern offices, time management features high on the list of items managers would like to have training in.

Ask the participants: 'What on earth can this training provide?'. Time is not like other resources available to a manager. It is irreplaceable, cannot be stored and above all is inelastic – it does not expand to meet the situation when we really need it to.

Point out that it would be wonderful if, as trainers, we could wave a magic wand when we only have five hours before an important deadline and so create an extra hour or day.

Being a time manager is mainly about one word, write this single word on the flipchart for added emphasis.

Focus



Show OHT 5.2
What is management?

Tell the participants that our definition gives them a clue to the main approach to managing their time. Point out that the definition draws a distinction between **efficiency** and **effectiveness**.

Ask the group to suggest what is the difference between the two. The answer will be along the lines that:

- **Efficiency** – concerned with how well something is done.
- **Effectiveness** – actions that bring about the right result.

Being effective is a powerful way for managers to ensure they achieve the results required of them from their organisation.

Where do we start?

One of the keys to effectiveness is to **start at the end**.

Ask the participants what they think you mean by this apparently contradictory advice.

What you are after are suggestions that in order to work effectively they will need to identify precisely what they have to achieve.

Ask the group how many of their organisations have a mission statement and a systematic approach to establishing their job purpose, key result areas and setting specific objectives.

TRAINER'S TIP

If the participants haven't completed *Activity 2 Oriented to the future* then you will need to allocate at least an additional 45 minutes to take them through an exercise in which they identify the purpose, key areas and sample objectives for their current jobs.

Point out that an effective manager does the tasks that matter rather than merely being busy. They set their objectives and then work to achieve them.

Priorities and delegation

The first step in becoming an effective time manager is to concentrate your efforts on your key activities. As covered in our earlier activities, this will involve the participants in being clear about their objectives for each key area of their work.

Once they have clarified what they have to achieve and by when (as expressed by their objectives), they will need to estimate how long each activity will take. Each objective should have a series of milestones towards which they can plan their approach. Time management involves them in protecting their plan to enable them to achieve the desired results.

'What planning system do you use?'

Ask the participants to tell you about what systems they use to plan their day. Many people bring order into their working lives by adopting a long-term written plan such as a Gantt chart (see *Activity 3 Planning the future*). You should also find that they use a combination of weekly and monthly diaries, probably coupled with an annual wall-chart that shows the milestones and notable dates.

Allow 20 minutes to introduce the activity, or up to an hour if participants have not previously completed the objective-setting exercise in *Activity 2 Oriented to the future*.

DEVELOP A DAILY 'TO-DO' LIST

Ask the group how many use a daily 'to-do' list (I usually expect a show of hands from some of the group). Ask those who use one to give you some examples of the benefits of having a list.

They will reply with suggestions such as:

- It gives me a constant visual reminder.
- I tend to forget things so I write them down.
- There is so much to do I need to be able to write them down to get them into some sort of order.

Inform the participants that having a daily 'to-do' list is a common denominator of most successful managers.

Point out that the technique is so simple it can feel like cheating. But who said that being effective has to be hard work?



Show OHT 5.3

Ground rules for 'to-do' lists

Discuss what is involved in each step.

To demonstrate what's involved, hand a blank sheet of A4 paper to each participant. Ask them to make a list of all the tasks they have to do when they return to work. Tell them not to try to think of any priority order but simply to write them down as they come to mind. They will find that once they start writing they will start to remember more and more items.

Give them about 5 minutes to generate their lists. When they have finished listing all the tasks they could do, we can begin to prioritise them.

DISTINGUISH BETWEEN IMPORTANT AND URGENT WORK

Point out that identifying priorities is not an easy task as it involves balancing factors. Participants will need to review the relative urgency and importance of each task and they will have to bear in mind the

relationship of each task to other matters, as well as human and political considerations.

Tell the participants that the next step is to determine for each possible task they have identified its importance or urgency in relation to their objectives and key result areas. When they have completed that task they can then decide when it will be done and by whom.

Ask the participants for their suggestions on how to define important and urgent tasks. The answers you are looking for are along the lines of:

- **Important tasks:** Those tasks that will lead to the accomplishment of an important objective. The situation will worsen if they are not completed successfully.
- **Urgent tasks:** Those tasks that have to be done in a very short time-scale. In most office environments this usually means **now!**

Point out that at work there is often a constant pull on our time between the two. The problem with important tasks is that they often do not have to be done straight away, whereas urgent tasks often call for immediate action.

Tell the group that under the pressures of the modern business world the hardest part is to get off the treadmill, stop and take stock of what we are doing and why we are doing it.

Ask the group to look through their 'to-do' lists and decide whether each item is either urgent or important. Point out that some tasks will be neither, others both.

Ask them to categorise each task according to the four-part approach shown in OHT 5.4.

Tell them that the next stage involves deciding how to deal with the tasks when they have decided which is urgent and which is important.



Show OHT 5.4

The priority grid

This grid is made up of four panes which show how different tasks should be handled depending upon their relative urgency and importance.

- **Pane A:** High urgency, high importance – high-priority items which someone should do **now**.
- **Pane B:** Low urgency, high importance – it is important that these are done efficiently but not necessarily today.
- **Pane C:** High urgency, low importance – less important tasks that need doing soon.
- **Pane D:** Low urgency, low importance – does anyone need to do this?

Give participants between 10 and 15 minutes to complete this preliminary review.

Move around and check any difficulties they may be encountering. Problems sometimes emerge with items that fall into grey areas between the categories. Tell them not to worry. This is only a tool, not an inflexible rule they are bound by.

Check that all the participants have finished their rating. When they have, inform them that the next step will involve them in asking themselves one of the key questions in managing their time.

DECIDE HOW TO SPEND YOUR TIME



Show OHT 5.5

What's the best use of my time right now?

Discuss each of the points on the transparency.

- **Set your priorities**

Having identified the A, B, C and D items on your 'to-do' list, you should then decide which task is the A1, A2, A3, and so on. If you have an in-tray full of paper, a good tip is to sort the documents into different trays. Keep the low-priority items off your desk by putting them in a special drawer. You will know where to find them if there are any follow-up calls.

- **Start with As not Cs**

It is important that you make a start with the high-priority items. It is quite easy to fall into knee-jerk reactive management which involves you in responding to items merely because they are urgent. C items are often easy and you can do them without much effort. There is a tendency to start with these items and a feeling of satisfaction of having done something.

Point out that being busy is not the same as being effective. Remind the group that achieving results is what is important, not crossing items off the 'to-do' list. To work effectively they must put their efforts into the activities that contribute to achieving their objectives.

- **Identify what you can delegate**

The priority grid will give them some valuable clues on who should do what.

As – Do it yourself now. Spend however long these vital tasks take. Think about who else can help you, but only delegate those parts of the task that can be done better by other people.

Bs – Consider delegating these to key members of your team. They can start building the foundation for successful completion. Schedule some time to keep an eye on their progress. These tasks are useful to develop your key people. They will respond well to being delegated something significant. Their performance will give you useful evidence of their abilities at a higher level.

Cs – Think about delegating these to your team, possibly someone less advanced than those to whom you delegate B tasks. Remember that the responsibility for efficient performance is still yours, so keep an eye on their performance and progress.

Ds – You may be tempted to ignore these altogether. Consider filing in your 'bring forward' tray when the ageing process may have moved them up the hierarchy. They could also be a useful opportunity to delegate to a new or inexperienced member of staff, giving them some initial exposure in a low risk area.

- **Do it now**

Don't procrastinate and put off those awkward jobs until later. Five minutes spent thinking about how you are going to tackle an A is a better use of time than 15 minutes bashing off a C. You will need to start somewhere. Collect information, talk to others, Mind Map® a diagram illustrating the possibilities.

Inform the group that having sorted their tasks they are now in a position to be able to plan their day. This will involve giving appropriate time to completing their A1 priority.

Tell the group not to forget to block out time for routine tasks such as opening the post and essential meetings, to leave some time for the unforeseen problems that are bound to crop up, and to allow enough time to plan the next day.

This session on deciding how to spend time should take no more than 20 minutes.

DELEGATE EFFECTIVELY

Remind the group that as managers they are responsible for 'achieving results with and through the efforts of other people'. Too many managers are reluctant to use one of their most important resources – their staff. They try to do it all themselves

and wonder why they are working excessive hours to meet their deadlines. Effective delegation will enable them to work smarter rather than harder in the pursuit of achieving what is really important.

Delegation involves giving people responsibility for particular tasks and the authority to carry them out effectively. Point out that the participants are still accountable for the overall actions of their subordinates.

Point out too that delegation is not about allocating work which is appropriate to that grade of staff. It involves allocating some of the work involved in achieving your key areas of responsibility, but you still retain the accountability for its effective performance.

What are the benefits of delegating?

Divide the participants into two groups. Tell them that they have 15 minutes to discuss and prepare to report back to the main group their ideas on one of two topics:

1. What are the benefits of delegating?
2. What might stop a manager delegating?

Give each group either a flipchart or sheets of blank acetate. Provide them with suitable marker pens and get them under way.

When they have finished, reconvene and hold a plenary review. The types of suggestion you should be looking for from each group include:

- **The benefits of delegation**
 - reduces your workload
 - frees you for more important work
 - gives you time to reflect and be creative
 - develops your subordinates
 - raises morale
 - provides cover in your absence
 - decisions made closer to the action
 - reduces costs
 - tests promotion potential of staff

- gives you evidence for performance appraisal
- a more effective department.

- **Management objections to delegating**

- it takes time, it will be quicker to do it myself
- my staff will know more than me
- only I can do the job properly
- it's risky – what if they make a mistake?
- I need to be seen to be busy
- I need to be in control and on top of everything
- I don't know how to do it
- other people will object – the staff concerned, the unions, other colleagues, my boss, customers.

Point out that they will need to examine these objections if they want to be able to delegate effectively. Some may be well-founded, but many are symptoms of a manager not really appreciating that their main purpose is to achieve results through other people.

Many of the objections reflect that managers view delegation as a risky process. Ask the participants for suggestions on how can they reduce and manage the risks involved.

They should be able to identify:

- **Avoid delegating the wrong kind of task**

Those to avoid include:

- confidential and private matters
- settling grievances
- disciplining staff
- deviations from policy
- topics relevant to your overall control of the section.

- **Choose a suitable person**

Factors to consider include:

- have they done anything similar
- how much knowledge do they have of this topic
- have they shown signs of being able to make decisions
- are they acceptable to other people whose co-operation they need?

- **Communicate fully to all concerned**

These include:

- the person to whom you are delegating
- their colleagues
- their staff (if they have any)
- your colleagues
- your manager
- anyone else who needs to co-operate to achieve the best results.

- **Communicate your confidence:**

- make sure everyone knows that you trust their ability to decide and act on your behalf.

This discussion on effective delegation should take about 30 minutes.

How do you delegate?

	<p>Show OHT 5.6 <i>Delegation ground rules</i></p>
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	<p>Distribute Handout 5.7 <i>Delegation ground rules</i></p>
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These will serve as a useful reminder during the next part of this activity, the role-play.

DELEGATION ROLE-PLAY

Allocate the participants into groups of three.

Explain that they will now have an opportunity to develop their skills in delegating.

In this activity they will play one of three roles in turn.

- The manager
- The staff member
- The observer.

Preparation

Ask the participants to think of a task that may be suitable to use for this exercise.

TRAINER'S TIP

If possible give the participants advance notice that they will be required to think of a suitable task. They can then bring any necessary information, props or equipment with them.

Ask them to read through the list of ground rules and to each spend about 10 minutes preparing to delegate the task to a member of the group who will be role-playing the staff member when they are acting as the manager.



Distribute Handout 5.8

Delegation exercise briefing

Discuss the main points with the group.

- As the **member of staff**, play yourself rather than be deliberately helpful, obstructive, and so on. Listen to the manager, respond in the way you think appropriate. Ask any questions on issues that need clarifying.
- When playing the **observer**, watch the role-play between the manager and member of staff. Does the manager follow all the ground rules? Make notes both on what you think are effective delegating behaviours and on areas where they could seek to improve.

Tell the participants they will have 10 minutes to prepare. Then suggest a time-scale of 10 minutes per role for the delegation activity followed by 5 minutes' feedback on each role.

When all the participants are ready, start the exercise. Move between the groups. Make sure they are keeping on track and that they change roles at the end of each role-play. If asked, give advice and information that helps the process.

Review the exercise

When all the groups have finished, reconvene the large group and lead a discussion on what worked well and what was more difficult.

Point out that in this exercise they have been like the people they will be delegating to. Learning something new can be difficult. It demands perseverance and practice. Mistakes may be made, but these should be viewed positively, and not treated as an opportunity to punish the individual. If they can master this technique they will be seen as effective managers who can concentrate on the tasks that need their attention.

Allow up to 1 hour for participants to work on this part of the activity.

LEARNING REVIEW AND SUMMARY

If you are using the Learning Review Diary (see page xi), ask the participants to think back over the activity and to identify what key lessons they will take back to the workplace after the event.

Allow between 5 and 10 minutes for individual consideration. When the participants have finished, ask for volunteers to share what they have learned, and the main action plans.

Remind the group to update their 'to-do' lists to take into account any actions formulated during their learning review.

When you have dealt with all outstanding issues, thank the participants for their work and close the session.

FOR PREVIEW ONLY

Time management

'Ordinary people merely think how they shall spend their time; a man of talent tries to use it.'

Arthur Schopenhauer, 1948, quoted in *Macmillan Treasury of Relevant Quotations*,
Macmillan Press, 1979

5.1

What is management?

Management is the *efficient, effective* and *economic* use of resources to achieve results with and through the efforts of other people.

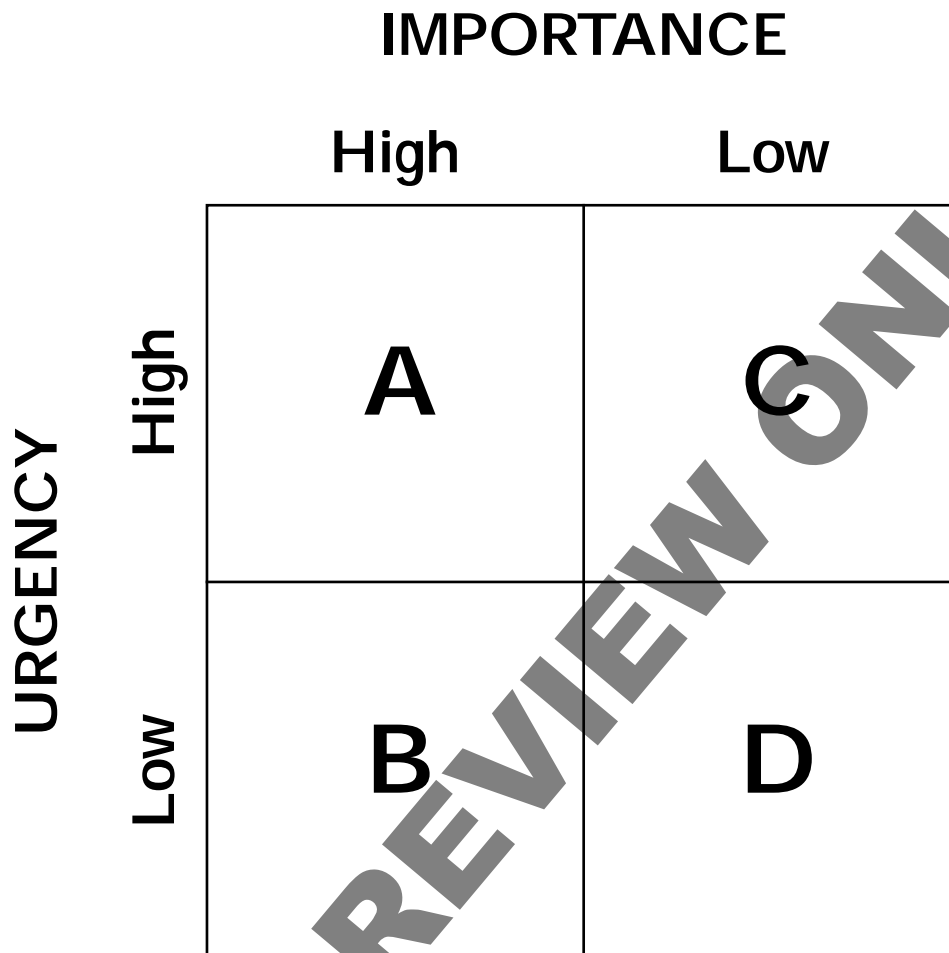
Ground rules for 'to-do' lists

5.3

1. Only have one list.
2. Be sure to write it down.
3. Rewrite the list at the same time each day.
4. Make sure to include your key result activities.
5. If a task will take a lot of time, break it down into its component parts.
6. List each part as a separate item.
7. Include activities that will help you move towards your long-term career goals.
8. Make sure you identify your priorities.
9. Identify what you can delegate.
10. Start with the important activities.

The priority grid

5.4



Pane A: High urgency, high importance

Pane B: Low urgency, high importance

Pane C: High urgency, low importance

Pane D: Low urgency, low importance

What's the best use of my time right now?

5.5

- Set your priorities
- Start with As not Cs
- Identify what you can delegate
- Do it *now*.

FOR PREVIEW ONLY

Delegation ground rules

5.6

1. Identify the task.
2. Decide what should be delegated.
3. Identify the right person.
4. Explain why you are delegating it to them.
5. Specify the expected outcomes.
6. Establish a target-completion date.
7. Discuss how they may go about it.
8. Identify the resources they will need.
9. Decide how and when you are going to monitor progress.
10. Identify who else needs to be informed.

Delegation ground rules

5.7

1. Identify the task.
2. Decide what should be delegated.
3. Identify the right person.
4. Explain why you are delegating it to them.
5. Specify the expected outcomes.
6. Establish a target-completion date.
7. Discuss how they may go about it.
8. Identify the resources they will need.
9. Decide how and when you are going to monitor progress.
10. Identify who else needs to be informed.

FOR PREVIEW ONLY

Delegation exercise briefing

5.8

You now have an opportunity to develop your delegation skills. During this activity you will play one of three roles in turn:

- (a) The manager
- (b) The member of staff
- (c) The observer.

- **Manager**

Think of a task that may be suitable to use for this exercise. Read through the list of ground rules and spend some time preparing to delegate that task to a member of your group, who will be role-playing a member of your staff.

- **Member of staff**

Play yourself, rather than being deliberately helpful, obstructive, and so on. Listen to the manager and respond in any way you think appropriate. Ask questions on any issues that need clarifying.

- **Observer**

Watch the role-play between the manager and their member of staff. Does the manager follow all the ground rules? Make notes when you see them perform what you consider are effective delegating behaviours. Also note areas where they could seek to improve.

Time allocation

Common preparation:	10 minutes
Delegation role-play:	10 minutes per role
Feedback:	5 minutes per role

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How do I establish in what areas I should be focusing my attention?
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- 5. Managing time and delegation**
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- 6. Recruiting and selecting**
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- 7. On-the-job training**
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- 8. Leadership**
How do I develop an effective leadership style?

9. Motivating your team

How can I get my team to work more effectively?

10. Feedback skills

How do I give and receive feedback to ensure the effective performance of my team members?

11. Managing assertively

How can I learn to manage others without manipulating them?

12. Face-to-face communication skills

How can I communicate effectively when face to face with others?

13. Written communications

How can I express myself clearly when writing?

14. Managing meetings

How do I ensure that my management meetings make effective decisions?

15. Managing budgets

How do I work out and manage my unit's budget?

16. Solving problems together

How can I help my staff resolve personal and professional problems that affect their work?

17. Performance appraisal

How can I conduct both formal and informal reviews to improve staff performance?

18. Customer care

How can I make sure I manage to be responsive to the needs of my customers?

19. Managing change

How can I manage change and create a more effective section?

20. Continuous professional development

How can I continue to develop my management skills and expertise?

FOR PREVIEW ONLY

ABOUT THIS RESOURCE

The Essentials of Management is a Trainer's Activity Pack which provides you with 20 activities that have been tried and tested on a wide variety of training programmes within organisations of various sizes and orientation. Each activity is free-standing and contains all you need to prepare and run it.

A key feature of this resource is the variety in activity length. This provides the trainer with a wide choice of time-frames ranging from 2½ hours to a structured two-day course.

The resource is based around the essential skills and attitudes that an individual new to management will need to master in order to achieve their objectives with and through the efforts of other people. The activities would also be suitable for experienced managers who want to revisit the topic to take a refresher or to update themselves with current thinking in the topic areas of their choice.

The pack does not set out to teach the content knowledge that will be the focus of each individual job or organisational specialism, for example, Customer Service Manager, Bank or Building Society Manager, or Electrical Engineer. This can usually be developed through training, study, experience and qualification in the particular discipline required.

The main focus of the resource is based on the premise that regardless of the technical or professional discipline involved, success cannot be achieved without knowing what you are trying to achieve, what skills you have that need to be developed, and how you can integrate the varied and complex needs of all the people you will come into contact with as you strive to achieve the long-term results by which managerial success can be measured.

You will not find any easy and prescriptive answers in these activities. Individuals are different and, just to make it even more interesting, their responses can vary from time to time depending on a variety of factors such as who they are with, what happened last week or even what side of the bed they got out of this morning. In these activities you will learn a set of principles which you will be able to apply flexibly to suit a number of changing and complex situations.

The activities are designed to be led by someone in the central role of trainer. The person fulfilling this role does not have to be someone whose

main role is in the training field. The activities can be run equally as well by a line manager or their direct staff. The approach used does not require a great deal of expert input. It is based more on acting as a facilitator – establishing a learning climate, using the previous experience of the participants to develop their awareness and identifying plans for their continued development as managers.

It is always advisable for anyone taking the lead training role to have experienced the activities involved before attempting to introduce them to others. We strongly advise working through each activity before you actually use it with your staff. The experience of doing so will give you some real-life examples based on your own experience which you can then use during each activity. Use as many examples as you can from your own management experience to illustrate the main teaching points in each activity.

The 'Further reading' list on page xiv includes references to books that you will find helpful as part of your preparation.

FOR PREVIEW ONLY