



**NOMA**

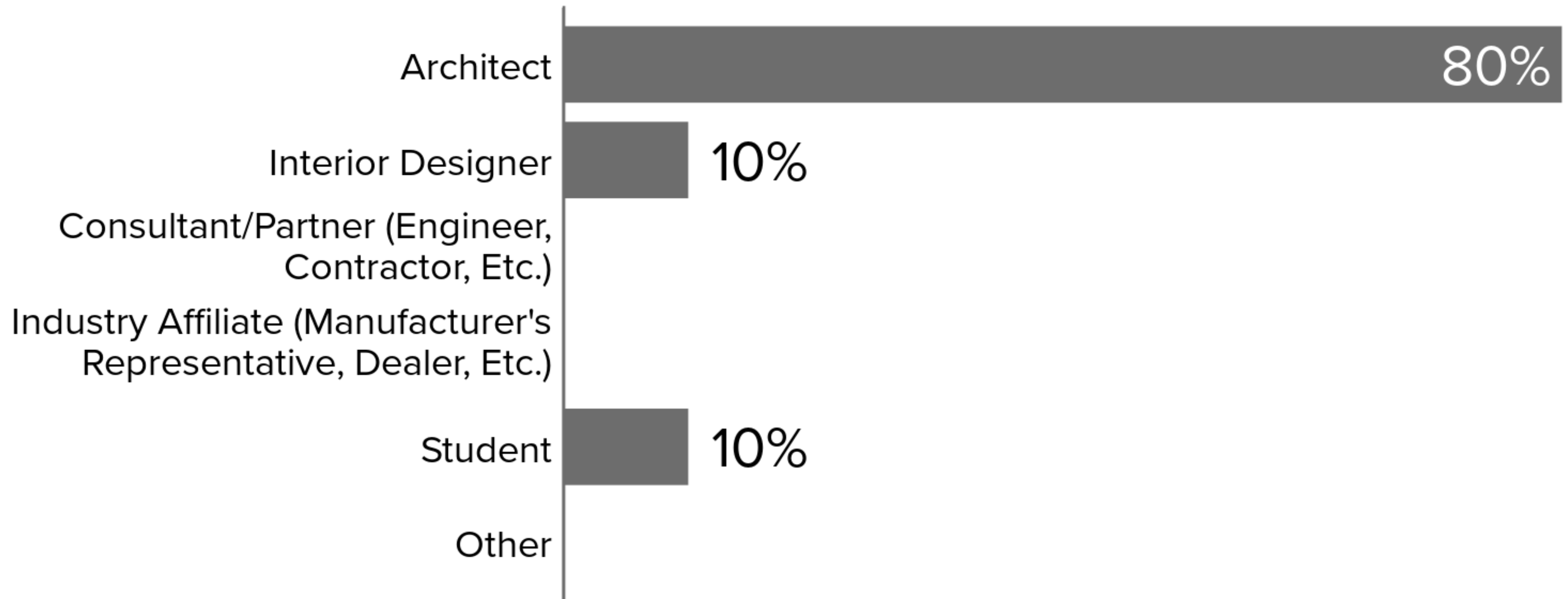
# Effective, Successful Delegation

September 2022

🌐 When poll is active, respond at **pollev.com/noma**

📱 Text **NOMA** to **22333** once to join

## Who's in the audience?





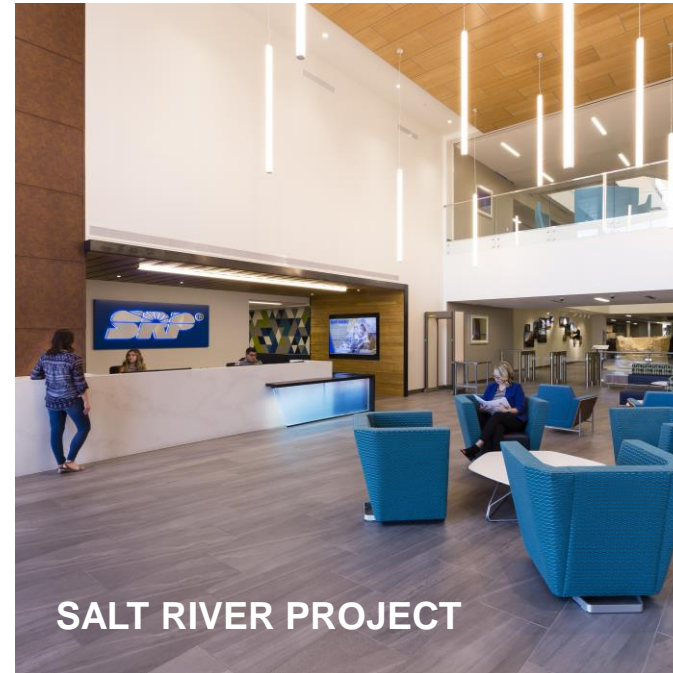
# A Leading Architecture and Design Firm



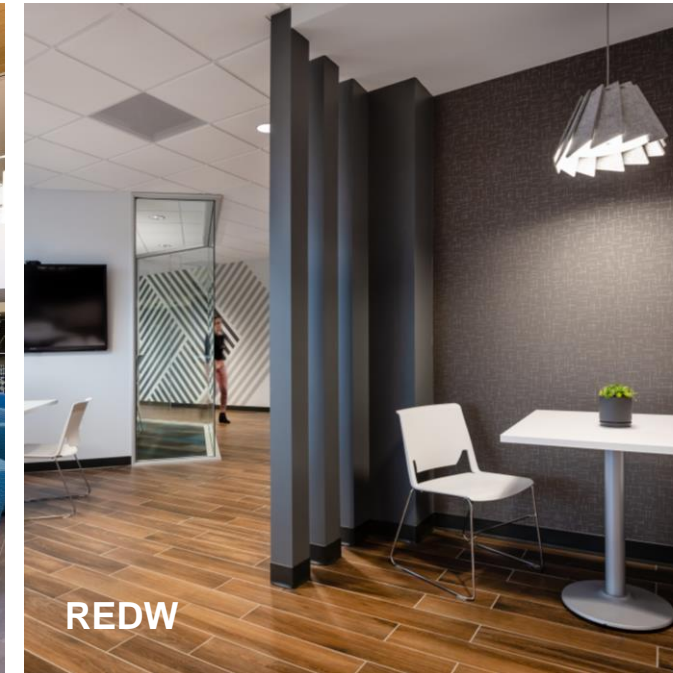


# Cheyne Brown

IIDA, NCIDQ, LEED AP ID+C, Fitwel Ambassador  
Director, Workplace Strategy



SALT RIVER PROJECT



REDW



BLUE CROSS BLUE SHIELD

## EXPERIENCE

- Graduated from ASU with BS in Design
- Started Interior Design career in LA
- Was a Project Manager for 6 years, running up to 40 projects at a time
- Now co-directs a distributed team
- Has held leadership roles both within my firm and in professional associations
- Teaches Interior Design at ASU
- Is mother to two elementary school aged children

# 18

YEARS OF  
PROFESSIONAL  
EXPERIENCE

# 15

YEARS IN  
LEADERSHIP ROLES





# What brings you here tonight?

“ Quity control ”

“ I'm a PM, but always ready to learn more about delegating, sometimes it's difficult to let go ”

“ Learn how to delegate better ”

“ Clear communication when delegating ”

1

## **ABOUT**

What is it and why is it important?

2

## **OPPORTUNITIES**

What are common challenges and how to set up for success?

3

## **TOOLS**

What are some of the tools to use when delegating?

4

## **RESOURCES**

Where can I learn more?

“

...the surest way for an executive to kill himself is to refuse to learn how, and when, and to whom to delegate work.

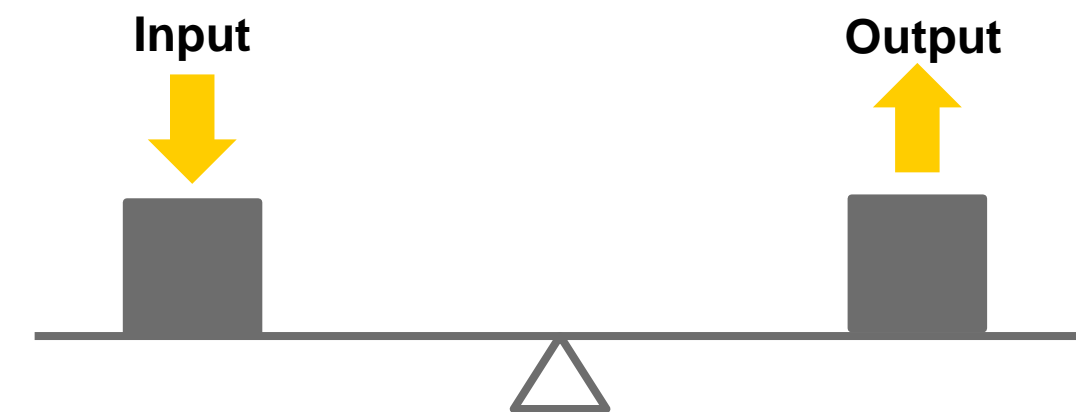
— *James Cash Penney, founder of J.C. Penney retail stores*

# Delegation is...

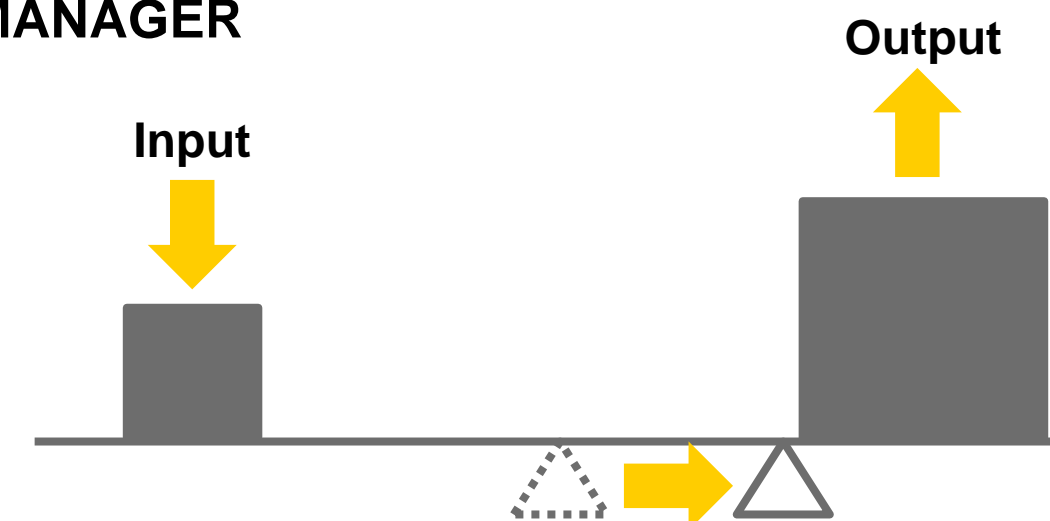
“the single most powerful high-leverage activity there is. ...the ability to delegate to others is the main difference between the roles of manager and independent producer.”

- Stephen Covey, *The 7 Habits of Highly Effective People*

## PRODUCER



## MANAGER





# Types of Delegation

## GOFER DELEGATION

*“Do this task and then tell me when it is complete.”*

- Thinking like a **producer**
- Directing who, what, when, how
- Focusing on **methods**
- Takes less time in the beginning, but requires manager to oversee every step along the way

## STEWARDSHIP DELEGATION

*“These are the results I’m expecting.”*

- Thinking like a **manager**
- Directing what but not how
- Focusing on **results**
- Takes more time in the beginning to explain expectations, but takes less time in the long run

# What are challenges you've experienced with delegation?

“ Clarity / misunderstanding ”

“ People think I'm not doing any work ”

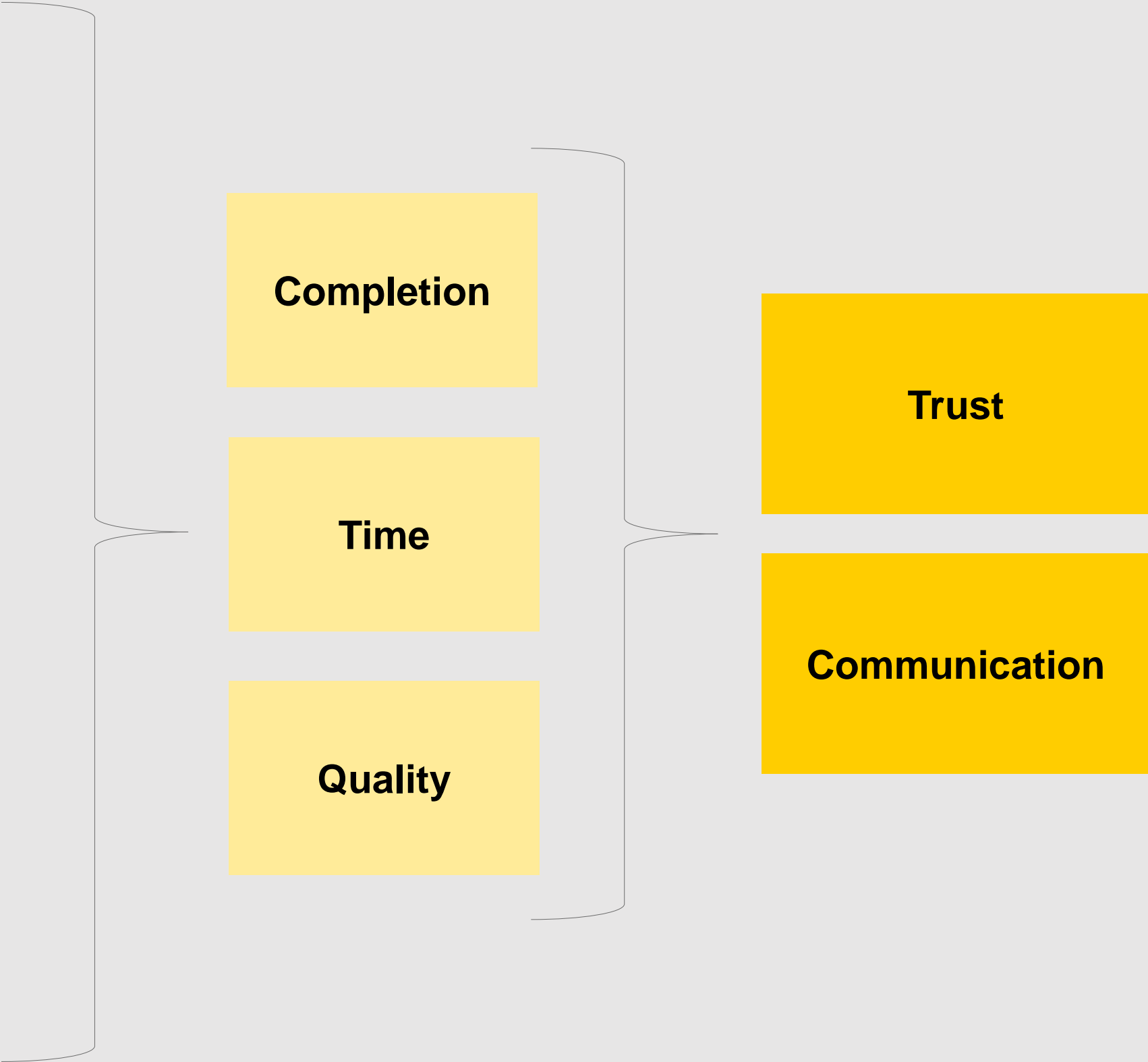
“ When the experience required is not proportional to the available experience. ”

“ ... ”

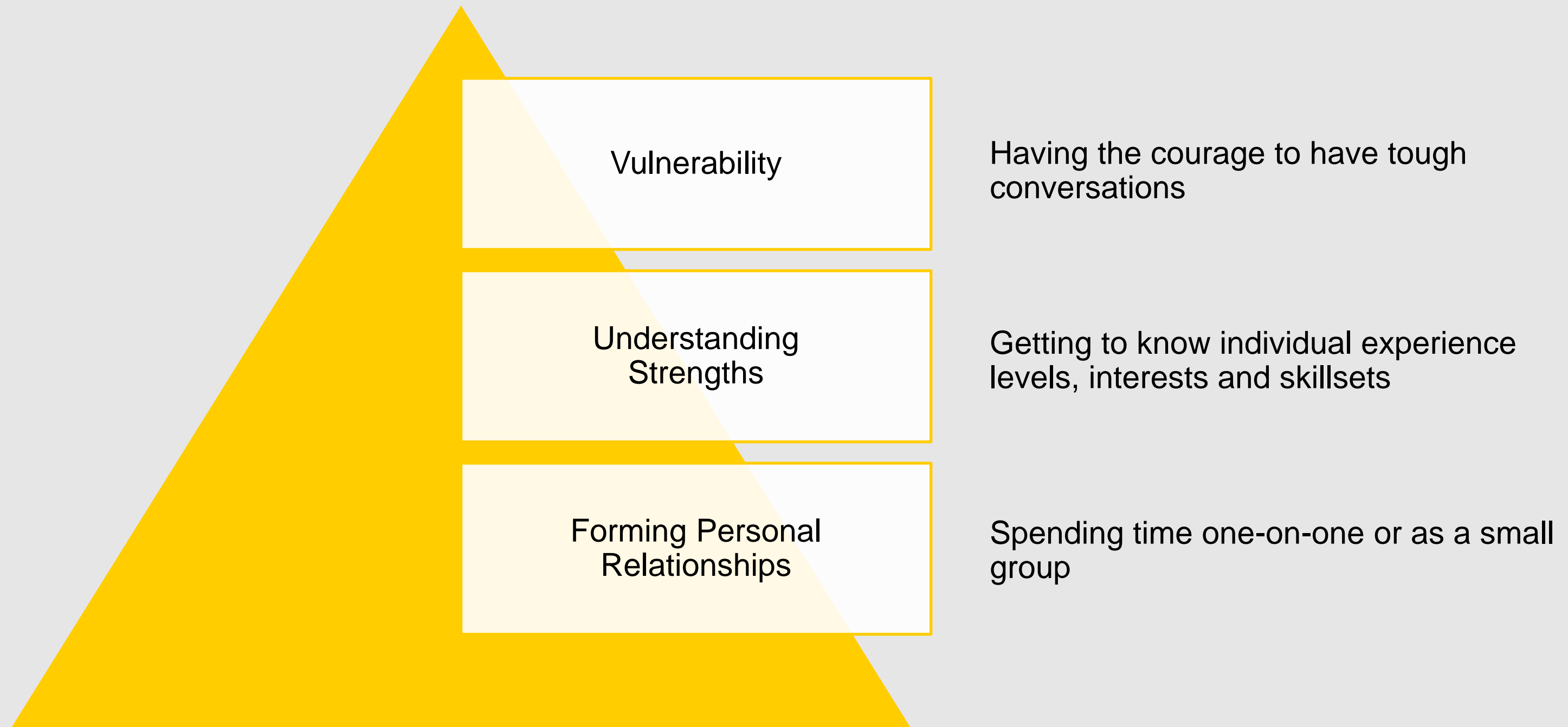


# Common Challenges

- I didn't know what work to delegate.
- The work didn't get done.
- The work didn't get done the way I wanted.
- The work didn't get done the way I would have done it.
- I ended up doing the work.
- The work took too long.
- It took too much time to explain the work.



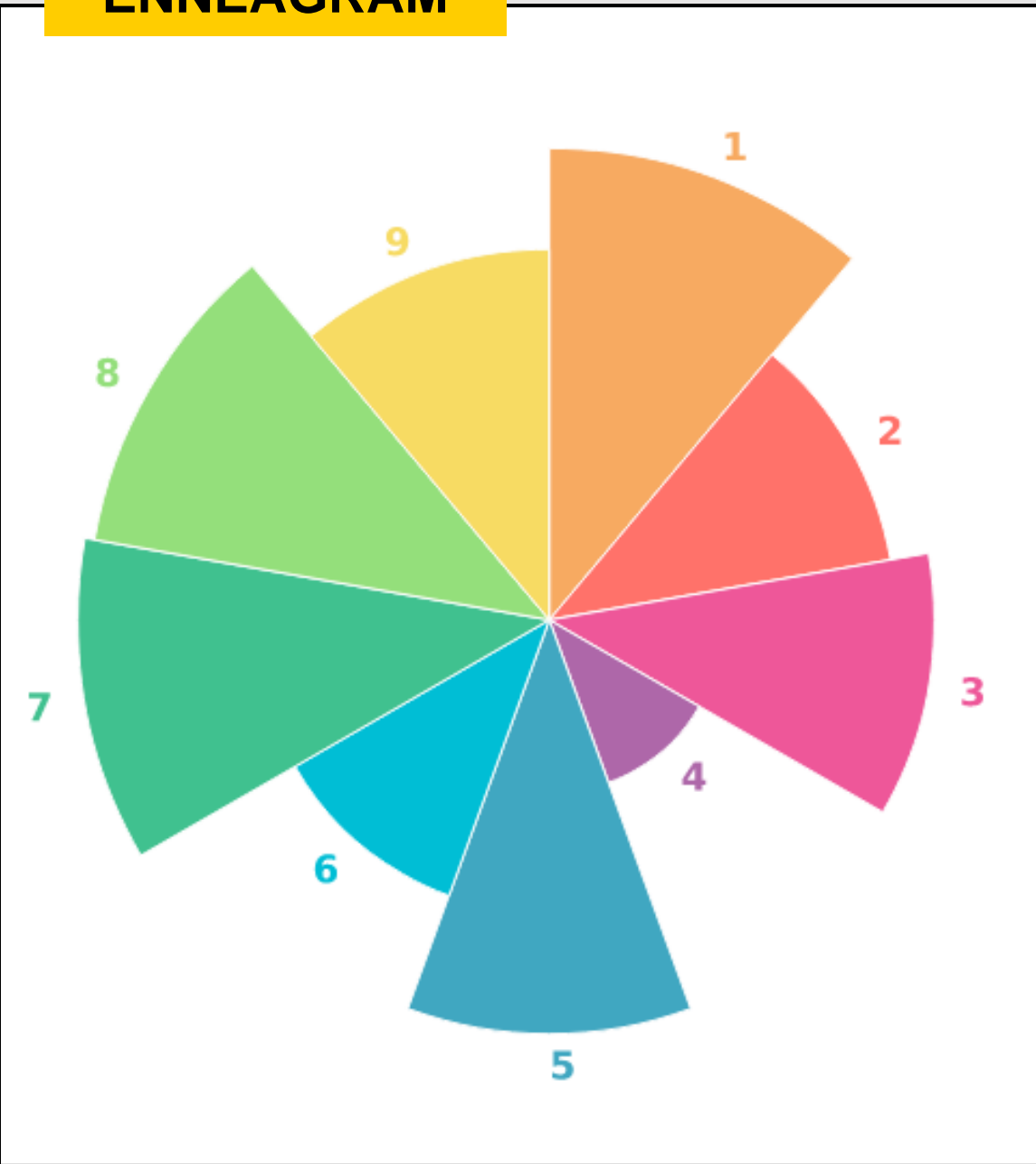
# Building Trust



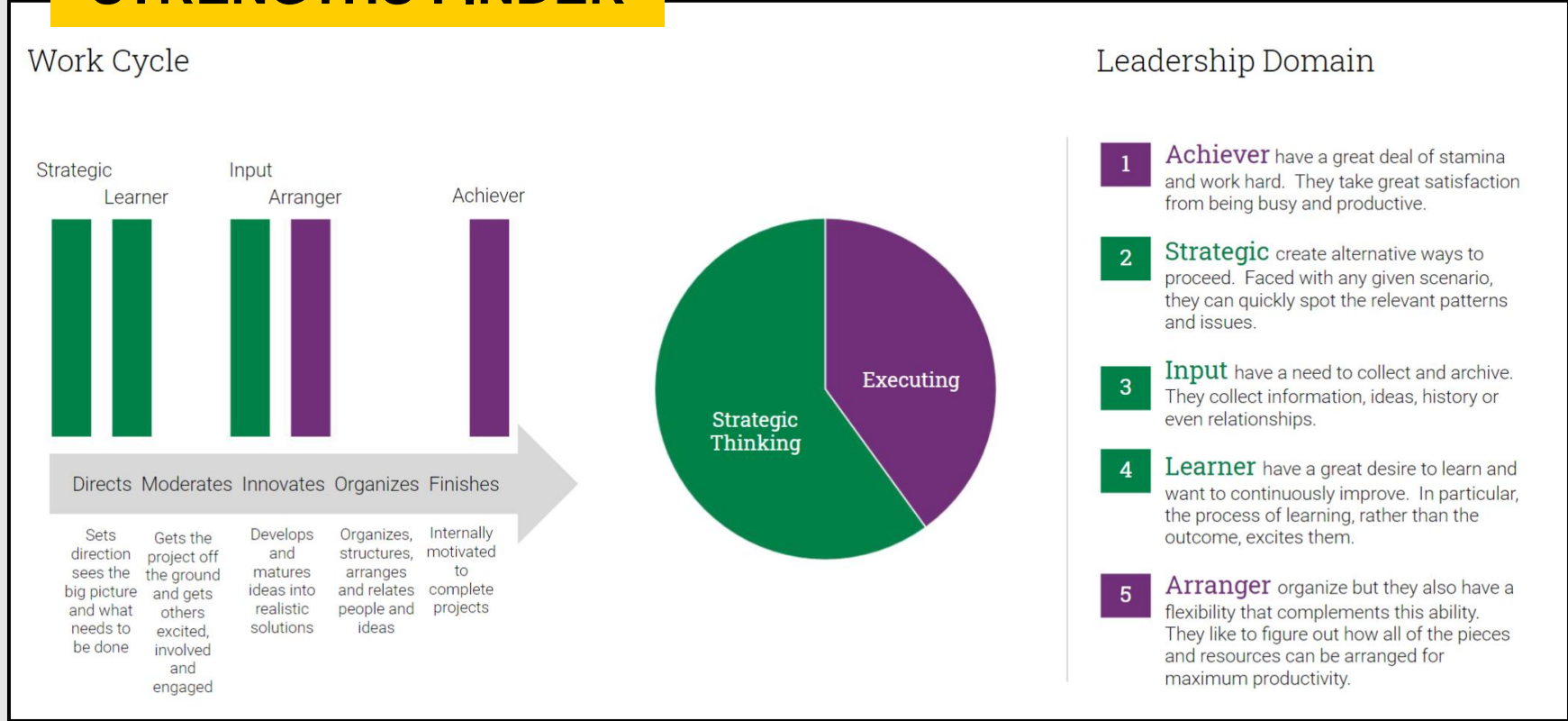


# Trust Through Understanding

## ENNEAGRAM



## STRENGTHS FINDER



## WORKING GENIUS

Judicious Accomplisher (D is her strongest w/ I coming in 3rd)

### WORKING GENIUS



Discernment

Tenacity

### WORKING COMPETENCY



Invention

Galvanizing

### WORKING FRUSTRATION



Wonder

Enablement

# Communication as a Foundation

DESIRED RESULTS	GUIDELINES	RESOURCES	ACCOUNTABILITY	CONSEQUENCES
<ul style="list-style-type: none"><li>• Create a clear, mutual understanding of what needs to be accomplished</li></ul>	<ul style="list-style-type: none"><li>• Define the parameters and potential pitfalls</li></ul>	<ul style="list-style-type: none"><li>• Identify resources available for support, including people, technical, and financial</li></ul>	<ul style="list-style-type: none"><li>• Establish how performance or completion will be judged, including times for reporting and evaluation</li></ul>	<ul style="list-style-type: none"><li>• Discuss good and bad consequences of the evaluation</li></ul>



# A Common Vocabulary

## PAINT DONE

- Painting done means not just assigning a task, but explaining the reason — clarifying how the end product will be used.
- Providing color and context — the purpose, not just the mechanics.
- Sharing the reason for a task helps uncover stealth expectations and stealth intentions, cultivates commitment and contribution, and facilitates growth and learning.

## TIME-OUT

- Taking a break when things get difficult during a rumble, meeting, or conversation; taking ten minutes for everyone to walk around outside or catch their breath.
- Everyone on the team should be empowered to call a time out.

## MARBLE JAR

- The marble jar is a metaphor for trust. People earn trust one small gesture at a time — each gesture is a marble in the jar. The people we trust are those who have earned a full jar of marbles. Trust-disrupting behaviors result in a handful of marbles coming out of the jar — it's hard to rebuild disrupted trust.
- When talking about trust, people talk about “earning marbles” and many leaders have gifted their teams mason jars and glass marbles as a symbol of trust building work. The jar serves as a reminder that trust is built slowly over time, one meaningful gesture at a time.

# Communication Tools

## EMAIL

### *Good when:*

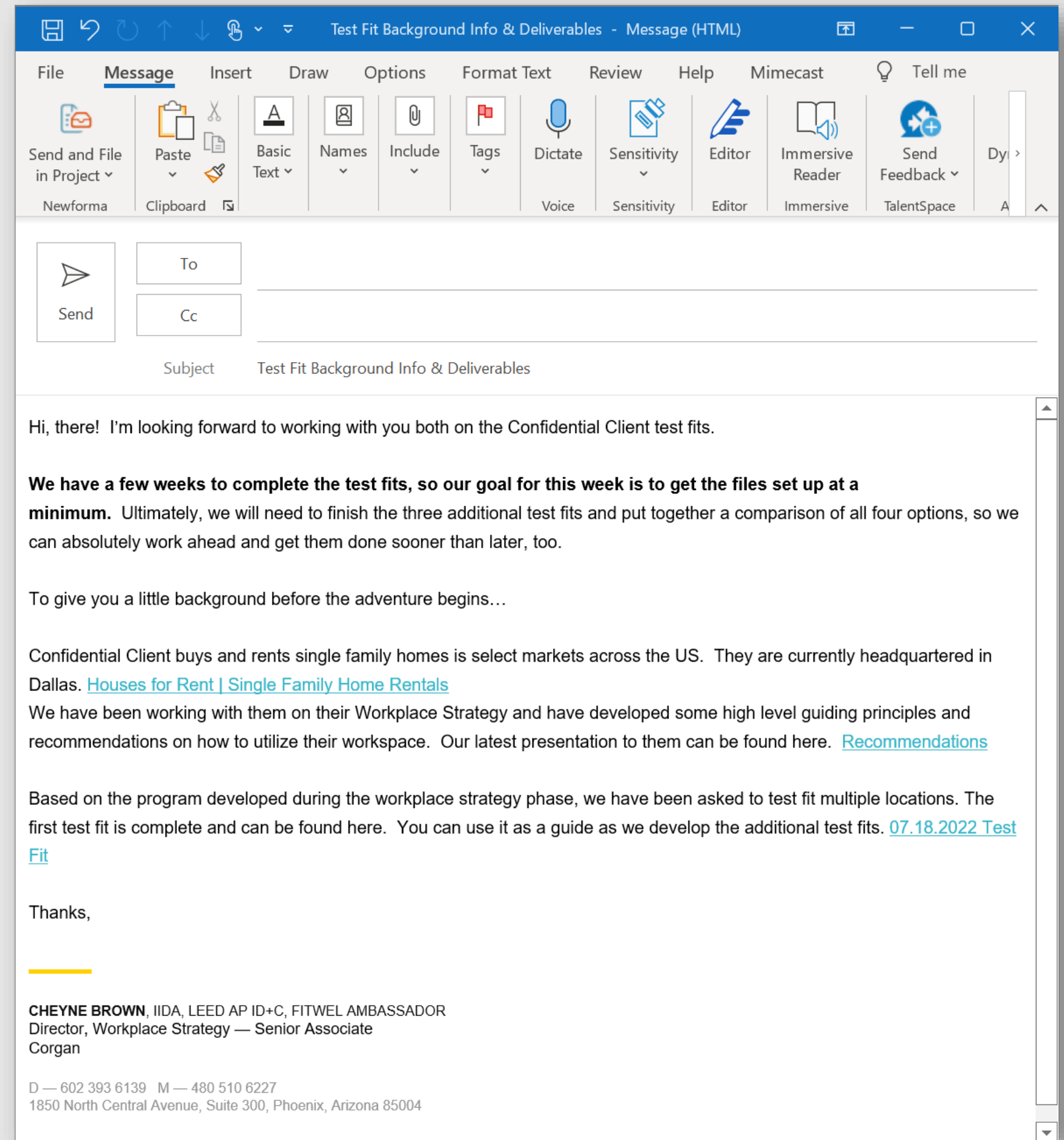
- Formally communication to a client
- Information needs to be referenced later
- Items need to be saved to a project file
- Sending to multiple people at once
- Doesn't require a quick response

### *Not good when:*

- Informally checking in
- Expecting a quick response

### *Tips:*

- “Delay Delivery” allows you to control when an email is sent
- Can flag for follow up and add an automatic reminder
- Can mark as high or low importance
- Bold or highlight critical information if a longer message





# Communication Tools

## SCHEDULED MEETINGS

### Good when:

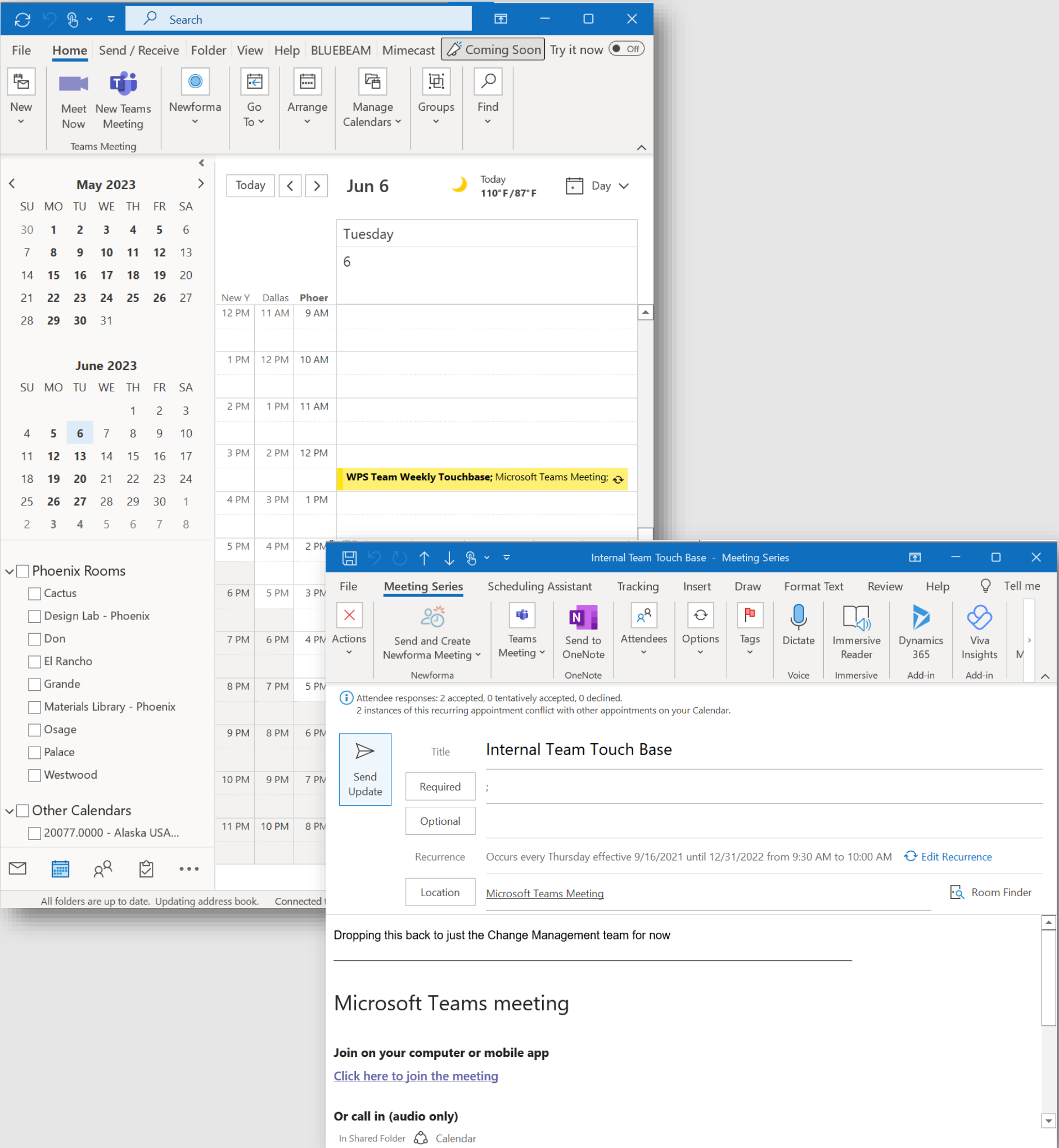
- Kicking off a new effort
- Coordinating a scheduled deliverable
- Checking in on a regular basis on a longer-term engagement

### Not good when:

- Too long and there isn't content to review
- Sent out with short notice and participants aren't able to prepare

### Tips:

- Set a 15 or 30 minute weekly touch base project team meeting to review progress, allocate resources, and plan the upcoming work
- Use this forum as a chance to review non-urgent questions
- Cancel the meeting if it isn't needed



# Communication Tools

## TEAMS CHATS & CHANNELS

### Good when:


- Informally connecting with one or more teammates
- Checking in or providing a status update

### Not good when:

- Need to go back and find the information later
- Have multiple conversations occurring about the same topic

### Tips:

- Use channels whenever possible to keep information in one place
- If using chat, rename the conversation to reflect the project or topic being discussed



Cheyne Brown

5/17 5:46 PM


👍 2


I'm going to work from home tomorrow morning (our Invitation Homes meeting is super early for me) then I'm on PTO in the afternoon for Maggie's class party.


↩ Reply

<b>Workspaces (Primary)</b>		<b>Community</b>	
Office / Flex Office	20 21	Reception/Welcome	1 1
Workstation	205 208	Coffee	2 2
		Work Café	1 1
		Library/Lounge	1 1
<b>Workspaces (Alternative)</b>		<b>Wellness</b>	
Phone Booth / Privacy Pod	15 13	Mothers' Room	2 2
Focus Room	15 15	Wellness/Quiet Room	2 2
		Prayer Room	1 1
<b>Collaboration</b>		<b>Support</b>	
Conversation Room	5 5	Mail Room	1 1
Huddle Room	8 8	Print / Copy	2 2
Small Conference	6 8	Storage	4 4
Medium Conference	4 4	Personal Storage (Lockers)	1 3
Large Conference	2 2	Open Area Filing	1
Extra-Large Conference	2 2	IDF/Electrical	4 3
Open Collaboration	6 7		
Work/Team Room	2 2		

Hi everyone! Here is the current progress on the Lincoln model as well as the program counts and marked up blue beam session. I wasn't able to finalize the plans today as some rooms are still missing some furniture or doors but I am happy to jump on tomorrow morning if needed! Let me know your thoughts on the major changes up in the northern areas

 IH Test Fit Lincoln Cent... ⋮


 IH Test Fit Lincoln Cent... ⋮

 IH Test Fit Lincoln Cent... ⋮

8/17 8:48 AM

👍 1

I updated the USF numbers where we know them and then added a comparison summary of projected need vs available. Same file location - also dropping the updated PDF here.

 Program Summary-600Travis-220817.pdf ⋮

# Communication Tools

## TEAMS TASKS

### Good when:

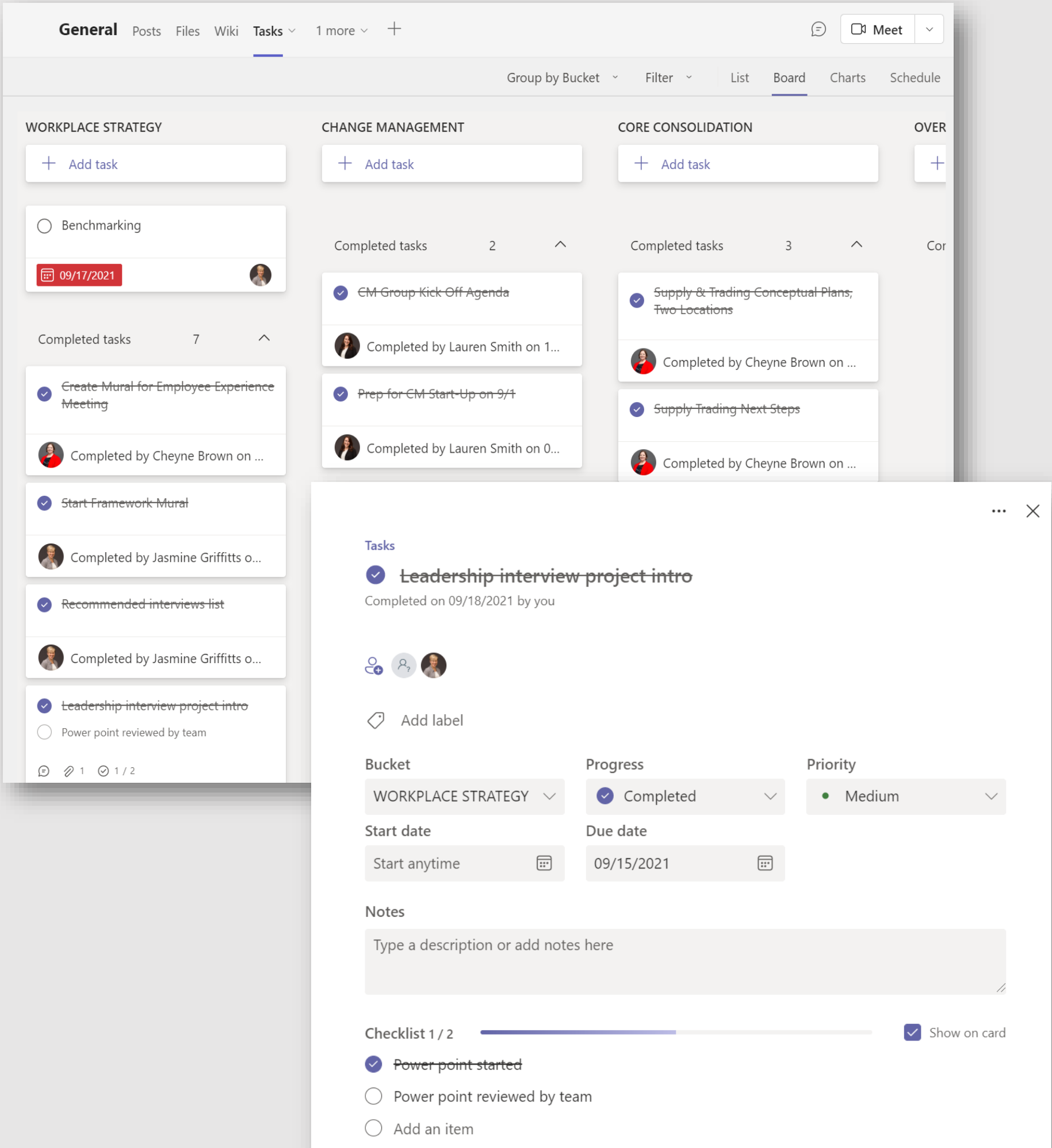
- Tracking multiple work streams
- Assigning and grouping tasks
- Already using Teams as your communication platform

### Not good when:

- Primary communications tool is something else – results in another place to track

### Tips:

- Assign, schedule and include progress updates in one location
- Will automatically send reminders to those assigned when tasks are due
- Has multiple view options
- Can use as a tool during regularly scheduled team meetings





# Communication Tools

## ONENOTE

### Good when:

- Keeping a detailed checklist in a shared document
- Multiple people are updating

### Not good when:

- Needs to be emailed or shared outside the team

### Tips:

- Works well with other Office programs, including Teams
- Can flag items and create them as Outlook tasks

8/30 - This Week - OneNote

Search (Alt+Q)

File

Home

Insert

Draw

History

Review

View

Help

Table

Cut

Copy

Paste

Format Painter

Clipboard

Calibri

11

B

I

U

x<sub>2</sub>

Heading 1

Heading 2

To Do (Ctrl+1)

Important (Ctrl+2)

Question (Ctrl+3)

To Do Tag

Find Tags

Outlook Tasks

Email Page

Meeting Details

Email

Meetings

General

Task Force Meeting Notes

Informal Notes

Change Management

To Do

S\_T\_F

Meetings

- 8/31 - Task Force review
- 9/1 - Task Force Weekly Meeting - WPS + CM Kick-Off
- 9/1 - Client meeting
- 9/15 - Change Management Kick-Off (with Task Force + select guests if needed)

Priorities

Done	Task	Responsibility	Target Completion
<input type="checkbox"/>	Project Charter Revisions (if needed)	Cheyne	9/3
<input checked="" type="checkbox"/>	Prep for WPS Kick-Off	Emily + Jasmine	8/30
<input checked="" type="checkbox"/>	Prep for CM Kick-Off	Lauren + Rae'Van	8/30
<input type="checkbox"/>	CM Outline/Strawman	Lauren + Rae'Van	8/31
<input type="checkbox"/>	Detailed Timeline (2 weeks ahead)	Cheyne	8/31
<input checked="" type="checkbox"/>	Meeting pre-read to SRP	Cheyne	8/31
<input type="checkbox"/>	Monthly Status Report	Cheyne	8/31
<input checked="" type="checkbox"/>	Meeting Notes	Cheyne	9/3

CD to do

Monday, November 25, 2019 1:38 PM

Engineering backgrounds

☒ Demo (includes input existing conditions)

☒ Demo RCP (includes input existing conditions)

☒ RCP

☒ Power/Furniture

☒ Tag equipment

☒ Elevations

☒ Specialty Equip Schedule (microwave spec needs wont populate)

☒ Keynote Schedules

☒ Lighting cut sheets

☒ Equip cut sheets (1/2 check mark, I cant remember if all the specs were there or not, I think so)

Alternates

A01 pending

A02 NO

A03 Need to price out quarry tile replacement

A04 Accepted

A05 BCBS will provide and install

A06 Replace base cabinets instead of re-cladding

A07 New doors

A08 Keep as add alternate, but paint trim base bid

Sheet Complete	Sheet Number	Sheet Name	HRS	Responsible	Notes / Questions
X	G00	COVER SHEET	2	Jennifer	Means of egress to be updated
X	G01-02	LIFE SAFETY PLAN	6	Jennifer	Done, needs to be looked over
X	IA00-01	DEMO FLOOR PLAN	4	Jennifer	Done, notes looked over
X	IA00-09	DEMO RCP	4	Jennifer	Done
X	IA02-00	WALL & PARTITION TYPES & NOTES	12	Jennifer	Done, needs to be looked over
X	IA02-01	FLOOR PLAN	6	Sarah	
X	IA03-01	REFLECTED CEILING PLAN	6	Jennifer	Done, one lighting conflict at the corner lounge wall that is now full height, notes looked over
	IA07-01	ELEVATIONS	12	Sarah	
	IA07-21	INTERIOR DETAILS / MILLWORK DETAILS	12	Sarah	
	IA09-00	FINISH SCHEDULE, NOTES	8	Sarah	Finish schedule
	IA09-01	FINISH PLAN	6	Sarah	
X	IA10-01	POWER PLAN	8	Jennifer	Done, microwave spec will not populate, will need to look over. Notes gone through

# Communication Tools

## RACI MATRIX

**Good when:**

- Multiple stakeholder and decision makers are involved
- The team is large with layers of responsibility

**Not good when:**

- The work is simple and straightforward, since it takes time to build and maintain

**Tips:**

- Stands for “Responsible, Accountable, Consulted, Informed”
- Prepare early in the project and review with all parties for accuracy of stakeholders, tasks and activities

RACI CHART EXAMPLE							
Project tasks	Senior Analyst	Project Manager	Head of Design	SVP Finance	SEO Lead	Sales Director	Senior Management
Phase 1: Research							
Econometric model	R	I	I	A	C	I	I
Strategic framework	A	I	I	R	I	I	C
Risk factors	R	I	I	A	I	I	I
Phase 2: Structure							
Product specs	I	A	R	I	C	C	C
Design wireframe	I	C	R	I	C	I	C
User journey	I	C	R	I	C	C	C
User experience testing	I	C	R	I	C	C	C
Evaluation framework	I	R	C	I	C	I	C
Development backlog	I	R	C	I	C	I	C
Delivery roadmap	C	R	A	C	C	C	I

ForbesADVISOR

# Additional Tools

## CONTRACT

- The proposal or signed agreement that outlines the scope of work, fee, and schedule

## PROJECT CHARTER

- Is a document created by the leader that explains who, what, and when the work is to occur
- Is often shared with the client

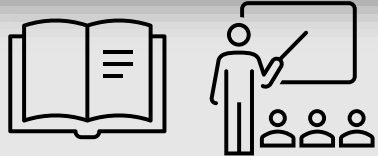
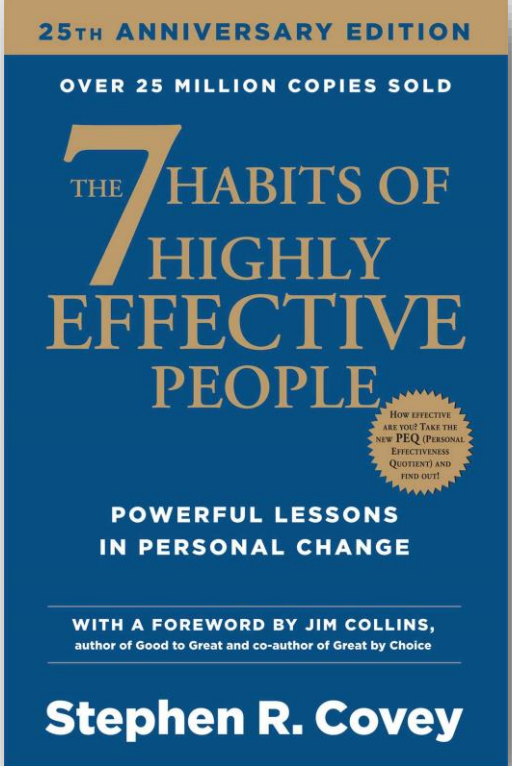
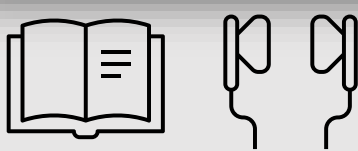
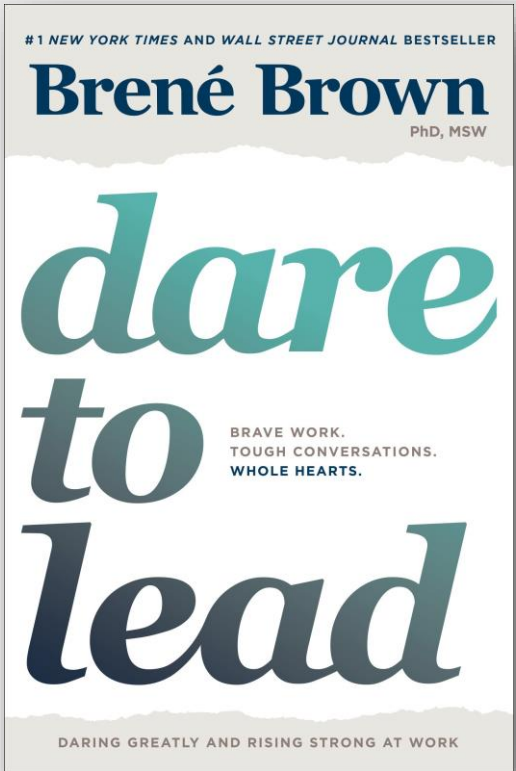
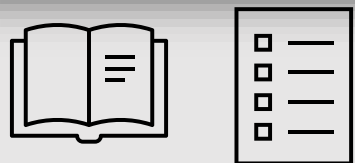
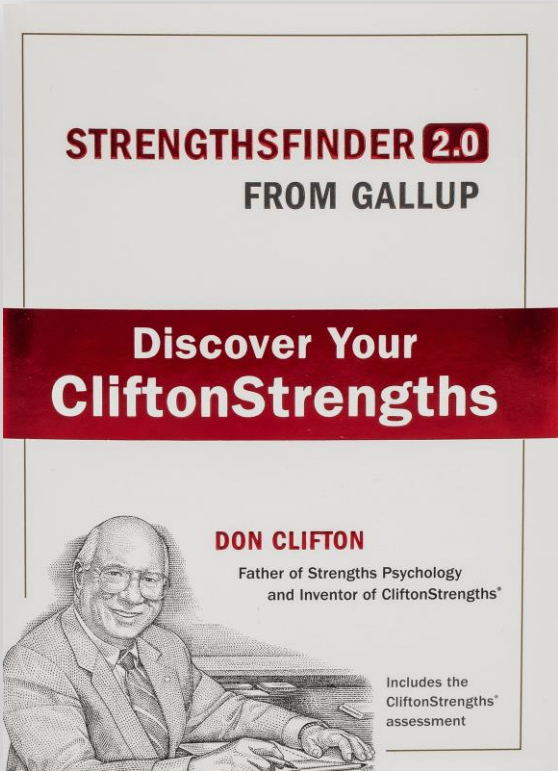
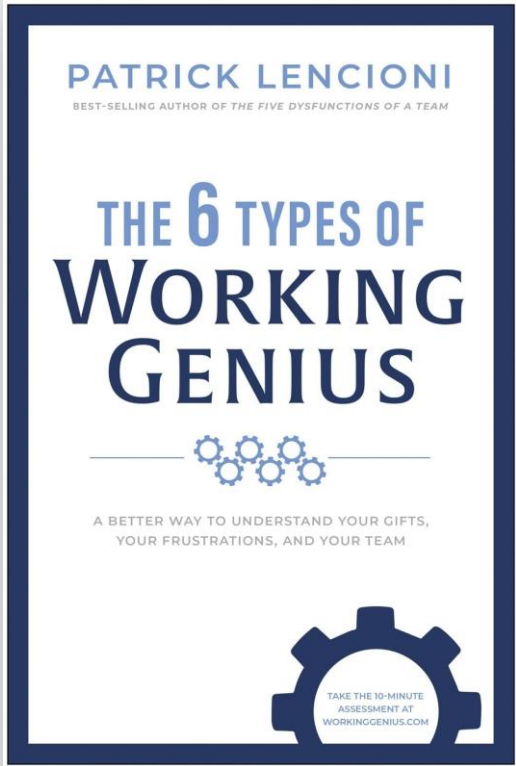
## EXCEL

- A spreadsheet tool for organizing information
- Can be used as a task list or responsibility matrix

## AGILE OR SCRUM BOARD

- A framework that shows tasks and level of completion
- Often structured as “to do, doing, done” or other simple terms

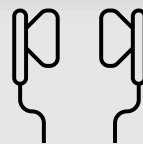
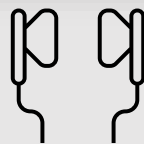
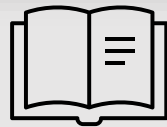
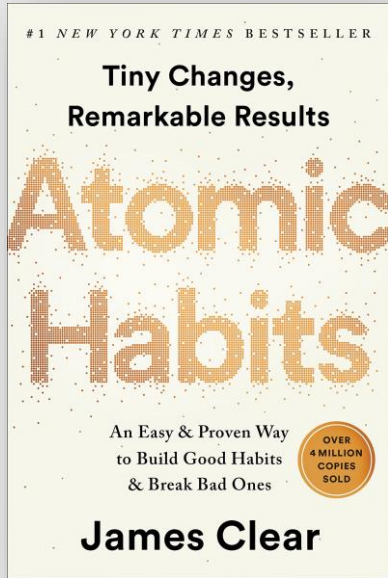
# Additional Resources





# Bonus Resources

Check out Episode #77: Paths to Leadership with Liz Leber, Managing Partner, Beyer Blinder Belle



**YOU DON'T HAVE TO DO EVERYTHING!  
EVEN BATMAN HAD ROBIN.**



[customerservicelife.com](http://customerservicelife.com)

**Thank you**