

Driving Decisions & Effective Delegation

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Small Portions.**

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WHITE PAPER

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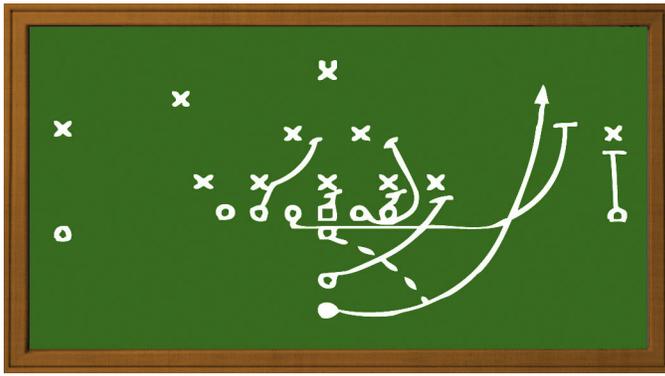
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Driving Decisions & Effective Delegation

With an average of 250 plays in his playbook, an NFL quarterback has a lot of decisions to make each time he approaches the line of scrimmage. Facing dozens of possible defensive lineups, which shift constantly, our leader must digest all the possibilities, make a final decision, call any necessary audibles that direct the other ten players, and get the ball into play. This all happens in seconds, and it happens more than fifty times each game.

Much is going on during a professional football game. There are coordinators up “in the booth,” coaches on the sidelines, and players on the field. Dozens of decisions are made and numerous delegations occur throughout each minute of the sixty-minute playing time. It makes for a good example of how today’s business leaders must approach the globalized world with its distributed workforces and 24/7 activity level. On top of this always-on reality we must layer cultural distinctions among our people, our partners, and our customers/clients. Quickly we find ourselves under the same pressure the quarterback feels each time he breaks from the huddle and moves his team toward the ball.

Maybe It’s All a Game

Sports analogies abound in discussions on leadership. Is this a chicken-and-egg conundrum? Or a query about art imitating life? Maybe the best question is, Does it matter?

But let’s leave the answers to these existential questions to those far better qualified to render an expert opinion, and agree that there’s something to be learned from the games we play. In fact, we might go so far as to revisit our perspective on what is, in fact, a game and what

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isn't. To the NFL player, football is not a game but a career—something to be taken very seriously and something in which much is invested. In the same vein, our chosen professions are not games. Those who succeed strive toward excellence and study others who succeed both inside and outside their areas of expertise. What then can we learn from a quarterback, or a point guard, or a midfielder?

This white paper looks at what today's executives face in a rapidly expanding global economy and how they can better execute the objectives and strategies set in front of them. The concepts and recommendations provided are offered as guideposts—things to be considered and implemented with as much customization as necessary to be effective. The objective here is to generate thoughts and ideas on how best to achieve the goals we have set for ourselves and our organizations. The operating premise is that if we are not reinventing and crossbreeding our skill sets and experiences, we are quickly falling behind in this era of rapid business evolution.

The Tactical View of Facilitating Forward Progress

The most obvious aspect of making decisions and delegating the related assignments is the endgame—facilitating forward progress. We can view this notion narrowly, as in getting a project to completion, or we can view it broadly, as in advancing the purpose(s) of the organization at large. Either way, just as in our football example, moving the ball down the field is the goal, for without this, no scoring can occur.

Consider the following list of suggestions for improving our ability to make and effect—through our own effort and via delegation—good decisions. Each suggestion is followed by a short description of the topic, and after the list is a detailed explanation of each one.

Suggestions for Making Good Decisions and Effecting Good Delegation

- 1. Maintaining Field Vision.** Keeping focused on the larger objectives while addressing the exigencies of the day is a critical skill every leader must develop.
- 2. Dynamic Triaging.** With e-mails, phone calls, texts, and all manner of other data inputs streaming in 24/7, today's leaders must effectively triage everything in a dynamic fashion to interleave and prioritize the latest batch of "ASAPs" with those already on the to-do list.

*Those who
succeed
strive toward
excellence and
study others
who succeed*

3. Articulate Delegation. All teams practice their plays before game day. Delegation is a skill that also requires practice. Assigning projects and tasks clearly and with enough—but not too much—supporting information is an area where huge dividends are paid to those who master the skill.

4. Engaged Follow-Up. For every item delegated, there is a result. Results can be measured. Thus, whether the assignment is a small task or a large project, completing it means a learning opportunity presents itself in the form of follow-up and review.

Maintaining Field Vision

Getting lost in the weeds is all too easy with hundreds of e-mails arriving 24/7, hours of meetings and conference calls to attend, and daily fires to extinguish. But for leaders one of the most vital tasks is maintaining field vision: seeing all that is going on both within and without the organization. By doing this, the leader operates as the guidance system for the objectives and purposes of the organization. Getting mired in the details strips us of our field vision and forces us into a highly reactionary mode. Once we're working from a reactive posture—on our heels—it's very hard to get back to a proactive position—on our toes.

Keeping perspective is primarily a function of presence of mind. The best way to remain mindful of the big picture is to take short breaks throughout the day. By "short" we're talking about five to ten minutes. By "throughout the day" we're talking about twice—thrice if that works better. (Hint: First thing upon arriving at work is a good time, before checking e-mail.) Hard-schedule these into the electronic calendar if necessary to make sure it gets sufficient visibility to occur.

During these respites, find or make a quiet space to relax. This can be in an office behind a closed door. It can be in a conference room. It can be on the sidewalk outside your office. (Another hint: The sidewalk recommendation is the best.) The objective of these moments is to reflect on what important priorities you and your organization face on this day and in the near future. With those identified, the next target of your focus is what activities are affecting your path toward success for those priorities.

Once grounded in our long-term objectives with good field vision, we can return to the fray with a refreshed sense of where we're guiding our teams.

*...the leader
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Dynamic Triaging

“What to do with it all?” Overwhelmed, that’s the most oft-asked question leaders express with regard to the never-ending stream of e-mails, voice mails, texts, and other forms of data inputs we receive. The only factor that has really changed in the last ten years is the volume of stuff coming at us. Stated differently, the underlying content is the same; there’s just more of it.

The most effective solution for dealing with all this stuff is to engage in dynamic triaging. As this medical term implies, the key is to move quickly through the latest batch of “stuff” and determine what is Trash, what is Archival, and what is Work. Toss or delete the Trash. Delegate the filing of the Archival to someone else (or move it into a “To Be Filed” folder that is shared with your assistant.).

As for the Work, first triage it into one of three categories: Action Items, Pending Items, or Reading. Action Items are ones that are either yours or need to be delegated (see the next section). Pending Items are either things you are waiting for someone else to get back to you on or things that cannot, for whatever reason, be acted on right now. Finally, Reading is for the material you need to consume to stay abreast of your line of work.

With everything triaged, the Trash and Archival out of the way, and the Work sub-categorized, the only thing left to do is interleave the new priorities into the priorities that existed before we triaged. This exercise gets repeated throughout every hour, day, week, month, quarter, and so on. Some people using ranking systems (1–5), some use reminder systems (date-specific times to revisit a Work item), and some use to-do lists. These are all fine ways to manage your deadlines. The key benefit of dynamic triaging is that it declutters our physical, electronic, and mental space, leaving only those things that require our attention.

Articulate Delegation

E-mail could have driven the act of delegating to new heights of power. Unfortunately, it has accomplished much the opposite: driving inefficiency via lengthy asynchronistic discourse that is often misconstrued and forces instructions to be repeated in a near-endless loop.

It’s not really e-mail’s fault. It’s the e-mail author’s fault. Delegation is a learned skill. Before e-mail most delegations occurred in real time via either face-to-face meetings or phone conversations. Real-time conversations naturally drive better results in delegated tasks

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and projects because the person receiving the assignment can ask questions to clarify what is expected and how the assignment should be completed. Moreover, because most people speak at about 150 words per minute, but type only 40 words per minute, much more information can be transferred in a five-minute real-time conversation than during five minutes spent typing an e-mail. Unfortunately, we still have only the same five minutes to get the project assigned. Thus, we have reduced the amount of information we're actually transferring, causing the endless-loop phenomenon mentioned above!

Two suggestions can resolve most of these difficulties. First, and easiest, determine if a particular task is best delegated during a real-time conversation or is simple enough to be delegated via e-mail. Second, assuming it is something that can be delegated via e-mail, try this format to see if it helps you to clearly communicate the assignment:

```
To: Delegatee
From: You
Subject: Johnson Marketing Proposal—Update Me by Friday,
March 22, at noon
Delegatee,
Please provide me an update of the Johnson Marketing
Proposal by this Friday at noon. Specifically, I need an
outline that contains the following information:
Concept
Brief Description
Deliverables to Client
Deliverable Deadlines
Team Members
Current Pricing
```

Notice that the e-mail doesn't assume that the recipient of this assignment is expected to magically determine what "updated" means to the person delegating the work. Moreover, by listing the items of interest in the update, an outline is formed that can be communicated quickly and is easy to follow. This assignment stands a great chance of getting done properly the first time.

Engaged Follow-Up

Mentoring or talent development is one of the most important functions every leader performs. Bringing people along in their careers not only ensures that everyone is on the same page and working together as a

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team, but also fosters a sense of loyalty that goes far beyond the job, the organization, and certainly the paycheck.

One of the best opportunities to deliver snippets of mentoring is during a post-project follow-up session. The recommendation here is to conduct a debriefing with team members on significant projects shortly after their conclusion. (Note: Midstream reviews can also be conducted with a similar objective: to advance the talents and skills of those involved.) The fundamental objective of these meetings—yes, meetings, not e-mails—is to determine what was done well and what could have been done better.

For the leader in the room, the key behaviors are discretion and inquisitiveness. Discretion means remaining virtually uninvolved in the substance of the conversation and acting instead as a facilitator of the interactions in the meeting. (Note: This component doesn't apply to a one-person debriefing, but inquisitiveness does.)

Inquisitiveness is required to ensure that a free-flowing and open discussion investigates what was done well and what could have been done better. If a leader starts opining on these issues, the rest of the people involved will immediately retreat and become quiet. Asking open-ended questions is the best way to effect this objective, resulting in a debriefing session where all those involved feel better educated and more prepared to tackle the next project with greater confidence.

Sifting through the myriad demands for our attention every day, prioritizing and reprioritizing the endless "ASAPs," and keeping our team focused on the endgame—moving the ball down the field to score—has become harder and harder as the business world has globalized and technology has inundated us with inputs. However, if we seek to keep our vision focused on the broader objectives, find ways to effectively sort through the countless data points, and develop interactions with our teams that result in good delegation and ongoing talent development, we will discover that we can rise to this occasion just as we have risen to all those that have preceded it.

The Strategic View of Facilitating Forward Progress

Maintaining field vision, dynamic triaging, articulated delegation, and engaged follow-up are all tactics that facilitate forward progress. When faced with the day-to-day barrage of information and distractions, developing these disciplines is critical for moving the ball down the field. However, there is another—more strategic—set of tools that will help you achieve long-term success by establishing and maintaining a competitive advantage.

*... seek
to keep
our vision
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the broader
objectives*

Following the sports theme of this conversation, consider the factors that go into creating a championship season or even the long-term success of a franchise that is competitive year after year. To achieve this kind of success we must look beyond the action on the field to that of the head coach, the general manager, and even the team ownership.

Suggestions for Achieving Long-Term Business Success

- 1. Form the Strategy.** Define the two-to-three sources of competitive advantage that define your business and enable you to deliver value to customers, grow faster than your market, and deliver a return on capital to shareholders.
- 2. Hire and Develop the Best Talent Available.** Find the right people to execute the strategy. At the end of the day, it all comes down to people making good decisions. In the long term, this requires building systems and processes that grow and develop talent internally.
- 3. Set the Vision.** Identify what defines success for your organization and clearly articulate a future state that brings that reality to light.
- 4. Execute the Game Plan.** Moving toward an articulated vision is not one giant leap; rather, it is a series of smaller steps. Some will be successful and some will not, but no matter where your business is today, you need a game plan for taking it to the next level.

Form the Strategy

We can't be all things to all people. Great companies understand the key sources of competitive advantage that enable them to deliver value to customers and returns to shareholders year after year.

Consider the two retailers Walmart and Nordstrom. Walmart competes by offering customers the lowest price on everyday items, clothes, and groceries. Walmart maintains this competitive advantage through scale and a Darwinian focus on efficient distribution that is fueled through investment in technology.

Nordstrom, on the other hand, competes on fashion and customer service. Nordstrom can charge premium pricing on clothes and other items by sourcing fashionable merchandise and delivering high-quality buying experiences that keep customers coming back.

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In both cases, these organizations know who they are, know what they are good at, and make strategic investments that align with their source of competitive advantage, establishing a positive cycle of growth.

Take a step back and observe your own organization from a different perspective, and ask yourself what drives your success. What are the two or three things you do better than your competitors? There are seven major sources of competitive advantage in business today:

1. **Cost**—A low-cost structure, a focus on efficiency, and usually large scale. Examples: Walmart, Southwest, McDonald's.
2. **Premium**—A high-quality product or experience that clearly sets the bar for luxury. Examples: Ritz-Carlton, Mercedes, Tiffany.
3. **Delivery**—A distribution model, usually disruptive, that delivers products to customers in an innovative form, fashion, or time line. Examples: Netflix, Amazon, GEICO.
4. **Innovation**—A relentless focus on new products, services, and distribution channels that deliver value to customers. Examples: Apple, Pixar, Nike.
5. **Know-How**—Cultivating unique talent and expertise that helps customers solve problems and make better decisions. Examples: Accenture, Goldman Sachs.
6. **Adaptability**—Customizing products and services to meet the unique requirements of customers. Examples: Starbucks, Dell.
7. **Bundling**—Bringing together multiple products and services under one brand, offering customers the convenience of one-stop shopping. Examples: Home Depot, Microsoft, State Farm.

As you scan the list, notice that none of these companies do all these things well. If a company tried to compete in all these areas, it would fail. Most successful companies do two to three of these things very well, and they align their company, including their talent, operations, and branding, around this strategy.

Can you list your two or three right here, right now?

Hire and Develop the Best Talent Available

In the business classic *Good to Great*, author Jim Collins followed a number of merely good companies as they transformed themselves into great companies. One of the common threads across all

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organizations that successfully make this transformation is a focus on what Collins describes as “getting the right people on the bus.” Once you have identified competitive advantages for your company, it’s time to develop a people strategy that aligns with maximizing those advantages.

In sports, this job falls to the general manager. In modern professional sports, many experts and fans believe that the most important person in a franchise is not the star pitcher, striker, quarterback, or even the coach. It is the general manager. This person has the responsibility of assembling the right group of players who can work together as a team and successfully produce a winning season.

Whether you are leading a business, a division, or a team, you are the GM for that group. You may need to fill in some holes with talent from outside your team or business, but great leaders grow and develop their own talent over the long term. This means carefully hiring the right people and investing in your employees through ongoing development and feedback, to ensure they are gaining the necessary skills over time.

Set the Vision

With the competitive advantages identified and the right people on the bus, it’s time to clearly set the vision for where your organization (or business unit, team, and so on) will be in the future—say, three years. The traditional method for establishing a vision is a two-day off-site meeting led by an experienced facilitator. These can be helpful and productive, and there are a lot of great books and articles on best practices in using this method.

However, some organizations just can’t afford this luxury. There are other, less intensive ways to articulate your vision. For example, try this exercise:

Imagine a date, three years in the future. Your company is profiled on the front page of the *Wall Street Journal*. Admit it: it feels good seeing your company and perhaps even a stenciled picture of you there. Now, write the article about your company that has so intrigued the editors at the *Wall Street Journal* and the business community in general. Is it about an innovative new product or maybe a unique approach to customer service? Maybe it is profiling your growth rate and the way you have disrupted your industry.

Invite other leaders in your organization to write their own article. Then, schedule a time to share your individual perspectives on the future. You might be surprised at the alignment of vision. You might be surprised by the divergent ideas. Either way, this is a great place to

*...assembling
the right group
of players
who can work
together as a
team...*

begin working together to establish a collective vision. This vision will leverage your sources of competitive advantage and align with your people strategy.

Execute the Game Plan

This is the critical step that brings together all of the strategic tools and prepares everyone to transition into the tactical execution. In sports, coaches always prepare a game plan well in advance, and communicate the plan to their players. The game plan translates the overall strategy for success (the sources of competitive advantage) into specific activities that move the organization toward the vision, while using the strengths of the employees. A solid game plan addresses key areas of the business, including sales, marketing, operations, talent, and financing. What are the metrics in each area that indicate success and demonstrate progress toward the vision? And what activities will lead to the desired outcomes?

Consider the long term. What initiatives are under investigation today that will help defend or even extend your competitive advantages in the future? For example, if you intend to compete on Know-How, what is your strategy for training and developing talent to be experts in their fields? Or, if you compete on Cost, what systems or technology are needed to maintain a cost advantage in the future?

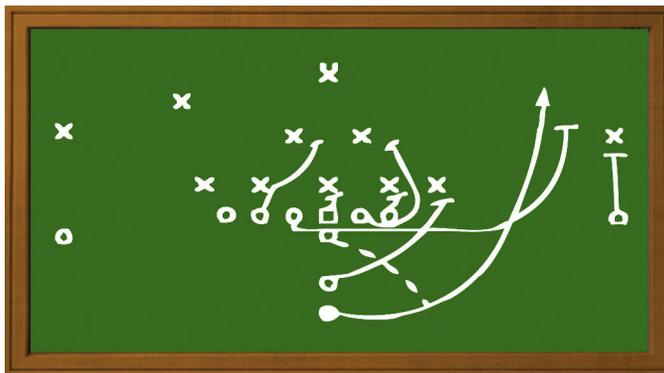
With a game plan established, make and keep it visible for all to see. And don't be afraid to change it from time to time! What great coach hasn't made adjustments at halftime? What great general manager hasn't shifted or even traded personnel here or there to assemble a championship team? Measure progress against the plan and celebrate successes along the way. If there are areas where your organization is falling short, and there will be, involve the team in addressing the challenge.

*... celebrate
successes
along the
way*

Summation

More than any time in the past, today's business world resembles that of a team-based sporting event. We started by looking at the myriad issues and decisions an NFL quarterback must grapple with before each play, all within seconds. Today's leaders are faced with much the same environment. Information comes at us in a constant stream, and responses are expected in short order.

Keeping track of what matters involves a combination of staying focused on the organization's high-level objectives while effectively triaging the information passing by and communicating the vision and the tasks to the right people who must join together to achieve success. As the "team's general manager," it is incumbent upon us to hire the right people and develop the skills necessary to bring together our employees in an effective way to deliver results.



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