
*Entelechy's Newsletter for Trainers, Managers, HR Professionals and Others
Responsible for the Performance of Others*

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MANAGING THE MONKEY: EFFECTIVE DELEGATION

(Tip: Copy this section and send it to your managers and team leaders.)

Managers often have the mistaken notion that their job is to answer all the questions, solve all the problems, and address all the issues. If that is how you interpret your role, you will fail as a manager.

Let's look at a common scenario. You walk into the office on Monday morning with your day planned. Bob, one of your hard-working employees, greets you, "Good morning boss. We've got a problem." Bob then proceeds to recount the details of the situation. As you listen, you realize two things: you can help Bob but it will take a little time. What do you do?

Many managers will say something like, "Bob, let me get back to you this afternoon with some information that can help...."

What just happened?

First, Bob came to you for guidance, not to take over the problem. Bob is now "on hold" while he waits for you to get back to him. If you don't get back to him when you promised, he becomes justifiably frustrated with what he perceives to be your ineptness or indifference.

Second, you were just trying to help. You realized that you had access to information that could resolve the issue. But you already have an overflowing plate of work. You are frustrated with what you perceive to be Bob's inability to solve problems and work independently.

There is a better way. It's called "managing the monkey." Imagine a monkey on Bob's back as he greets you on Monday morning. As Bob describes his problem to you, the monkey looks at you for an invitation to jump onto your back. You give the okay with words like, "Let me get back to you on that." And the monkey -- responsibility for the next step -- jumps onto your back! Joining all the other monkeys there that don't belong to you.

Here's how to manage monkeys:

- Realize when you are unwittingly accepting the responsibility that rightly belongs with your employee; the problem under consideration is NOT a joint problem -- it is the employee's problem.
- Practice saying "no" in a variety of situations and redirect (i.e., "No. I cannot help you with that. But I can spend 5 minutes with you right now to help you think of someone else who might help.")
- Say to your employee, "At no time while I am helping you with this problem will your problem become my problem. When this meeting is over, the problem will leave this office with you. You may ask my help at any time but the problem remains yours to solve."
- Don't let your non-verbal signals say "yes!" when your verbals are saying no: look the requester in the eye; act serious; if you're not sure if they're serious, ask.
- Set limits if you can't say no: "I can do this if..."
- Delegate/empower your employee using one of the five levels of delegation:
 - Level 0: Wait for my direction ("I've got the monkey.")
 - Level 1: Look into problem - provide facts - I will make decision
 - Level 2: Look into problem - provide me with alternative actions, make recommendations
 - Level 3: Look into problem - inform me about what you intend to do
 - Level 4: Take action - inform me of final result
 - Level 5: Take action - no further contact with me required

By managing the monkey, you are developing and empowering your employees AND you are freeing up yourself for tasks more appropriate to your managerial role. It takes

some discipline — especially at first. But it's worth it in the end. You win. Your employees win. And your company wins.

This information comes from *Time Mastery*, a module in Entelechy's *High Performance Management* program. If you want more information on this skill and others from our *High Performance Management* training program, please visit our website at www.unlockit.com.

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DEVELOPING TRAINING BASED ON CONTENT TYPES - PROCEDURES

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This is the second of six installments that focus on developing effective training based on content types. The model, developed by Dr. M. David Merrill at the University of Utah, is especially effective for blended learning since it helps distinguish content that may be more effective for self-paced training (i.e., WBT, CBT, MBT) and instructor-led or mentored training.

In this instructional design model, there are five primary content types: Facts, concepts, processes, procedures, and principles. Each of these content types can be taught at two levels: at the Remember level and at the Apply Level (except for Facts which only can be taught at the Remember Level). For example, you can LIST the steps to log on to a computer (Remember Level) or you can actually log on to a computer (Apply Level).

We'll focus on procedures in this installment.

Definition of Procedures

A procedure is a series of clearly defined steps that result in the achievement of a job task. There are two types of procedures:

- Linear procedures consist of a single stream of steps.
- Branched procedures consist of two or more alternative linear procedures that are selected by making a decision at a certain point.

Think of procedures as a series of specific and discrete steps. Leave out a step and you most likely cannot continue.

Examples of Procedures

The following are procedures (clearly defined steps that result in the achievement of a job task):

- Logging into a database application.
- Inserting a table into Word.
- Installing a washing machine motor.

Non-examples of Procedures

The following are NOT examples of procedures:

- Selling a washing machine. (This is a **PROCESS**, a content type that we will discuss in a future installment; when selling, there are **GENERAL** phases or steps but not specific, discrete steps.)
- Using Word to write an effective letter. (Certainly there are procedures embedded in this activity such as setting up the page, but the focus of this training is most likely on the **PRINCIPLES** of effective letter writing.)

How to Teach Procedures

While procedures can be learned at the remember level by memorizing the steps, this is not recommended. Procedures should be learned at the application level by doing them.

Learning objectives should begin with the application-oriented verbs such as: assemble, configure, demonstrate, log in, insert, perform, and process. Avoid remember-oriented verbs such as: define, list, recite, and repeat.

Information for teaching procedures should be displayed in flow charts or action and decision tables. A flowchart visually illustrates the steps and may differentiate actions from decisions. An action table consists of two columns; the first column lists the action to take and the second column describes the expected result. A decision table expands an action table by allowing for alternate actions or results; common decision tables have columns with headings such as “If ...” and “Then....”

The suggested learning/teaching sequence is as follows:

1. List the procedure (document it and provide it as a handout).
2. Demonstrate the procedure highlighting decision points and troublesome areas.

3. Optional: Ask one student to perform the procedure while the rest of the class observes; provide feedback.
4. Ask students to perform the procedure.
5. Provide feedback.

As you can see, classroom practice should move students to the application level quickly by providing follow-along demonstrations and exercises that require the employee to perform the procedure. Labs are most effective for practicing procedures.

Instead of having participants memorize procedures, create a user guide or set of job aids for post-training reference. If it IS important for learners to memorize procedures (for speed or accuracy), consider using a game to help memorize: participants stand in a circle; a participant recites the first step and throws a soft ball to another in the circle who recites the second step, etc.

How to Assess Learning

Evaluation of learning should be based on performance assessments. Participants should be assigned a procedure and be evaluated on the successful completion of the procedure (including speed and accuracy if that is required for job performance).

Refer to your learning objectives; if you used application-oriented verbs such as assemble, configure, demonstrate, log in, insert, perform, and process, use labs where learners can assemble, configure, demonstrate, log in, insert, perform, and process.

Most of the time, only the final result of the procedure is important. (i.e., if a person is successfully logged onto the application, we can assume that the learner followed the steps successfully.) However, sometimes it is important to follow the progress of participants as they go through the procedure. In this case, use a checklist of critical steps to record progress as the participant completes the lab.

Sometimes a simulation is useful in replicating “the real world” where the appropriate procedure must be selected and used using real data. Simulations can test a learner’s ability to use procedures within a larger context.

In upcoming issues of *The Key*, we’ll continue stepping through each of the content types and explore definitions, best uses, related objectives, best ways to assess, suggested learning activities, and recommended learning/teaching sequences.



This information comes from *High Performance Training*, a module in Entelechy's *High Performance Training* program. Much of the general information is provided free of charge at <http://unlockit.com/improve.htm>. If you want more detailed information on this skill and others from our *High Performance Training* program, please visit our website at www.unlockit.com or contact me directly at <mailto:ttraut@unlockit.com>.

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