

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

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EFFECTIVE DELEGATION – PART II

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

In the September 9, 2002 edition of *The Key*, we introduced effective delegation. In this issue, we provide tips for effective delegation – tips that will help you free you up for more important tasks, develop your employees, and increase your department's productivity.

### Five Levels of Delegation

There are five levels of delegation:

- Level 0: Wait for my direction (this really isn't delegating which is why it's level 0)
- Level 1: Look into the problem - provide facts - I will make the decision
- Level 2: Look into the problem - provide me with alternative actions, make recommendations
- Level 3: Look into the 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

## Selecting the Appropriate Level

Choosing the appropriate delegation level is fairly straightforward: “Does the person have the capability to do the work at the level I’m delegating?” Capability implies:

1. Time and priority; the employee must know the time requirements for this task and must have – or get from you – the authority to complete the work.
2. Skill; the employee must have the skill or knowledge required to do this work or must be provided avenues for getting the skill or knowledge.
3. Freedom/responsibility; the employee must understand clearly what is allowed and not allowed, what kind of reporting/check-in is required for YOU to feel confident, and what success looks like. Then the employee must have the appropriate freedom and latitude to do the work without interference from you.
4. Confidence; provide the appropriate level of support depending on the level of delegation. Too much support seems like meddling. Too little support seems like abandonment.

## Delegate Effectively

Delegate effectively by:

- Matching the task to skill set or development area.
- Discussing the end goal with the employee.
- Allowing for flexibility in solving the problem or accomplishing the task.
- Clarifying expectations, timelines, and support needs.
- Following up appropriately (depending on the task and the capability of the employee).
- Recognizing good performance.
- Coaching unsatisfactory performance.

## Delegation Dos and Don'ts

- Do ask yourself, “What is the most important thing I can be working on right now?” If you’re not doing that thing right now, consider delegating what you’re doing!
- Do be realistic. No one will do it as good as you or as fast as you the first time. Get over it. Your job in delegating is to determine what is acceptable and to manage to that level. Perfection is an unforgiving taskmaster.

- Do use delegation to develop employees. Increase the level of delegation and provide the support they need. Don't know what support they need? Ask!
- Do monitor appropriately. Don't confuse delegation with accountability. Even though you may delegate an entire task, you are still accountable at some level for its success. Check in. Recognize effort and results!
- Do ensure success. Provide communication guidelines to help prevent failures or stalls. "Give me an update every Thursday by 5:00." "Call me if you have trouble getting the figures you need and we'll brainstorm..."
- Do network. Often managers don't delegate because they don't know whom they can delegate to. Sometimes the best talent is within your own organization. Consider colleagues, other departments in the company (e.g., mailroom, copy service), vendors, and organizations outside the company. Consider personal contacts to whom you can delegate non-work related tasks (such as house cleaning, shopping, lawn care, etc.)
- Don't delegate things that only you can/should do. These include motivation, coaching, team-building, organization, praising, reprimanding, performance reviews, and promotions.
- Don't hang onto pet projects only because you like them. Look for opportunities to free up your time and effectively use your resources.

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](http://www.unlockit.com).

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#### DEVELOPING TRAINING BASED ON CONTENT TYPES - CONCEPTS

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This is the third 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 DEFINE the concept of a Tier One Internet Service Provider (Remember Level) or you can classify Internet Service Providers into tiers (Apply Level).

We'll focus on concepts in this installment.

### Definition of Concepts

Our everyday language includes many concepts such as chair, woman, and house. A concept is a mental representation or prototype of objects or ideas for which multiple specific examples exist. The ability to classify many things under a common heading is very efficient and is desirable in training and in work.

Concepts share critical features and vary on irrelevant features. For example, consider the concept "house." All houses share at least three critical features. All houses serve as living places for humans. (A barn is not a house.) All houses are permanent fixtures. (Recreational vehicles are not houses; trailer houses are questionable!) All houses are living places for one or a few families. (Apartment buildings are not houses.) An irrelevant feature might be the number of sides on a house (some have four, some have more, some are round).

A concept is a class of items that share common features and are known by a common name. All concept groups include multiple specific examples. Most technical training involves many concepts associated with procedures that employees need to know in order to perform.

Concepts are made up of critical features that all specific examples in that concept class share and irrelevant features on which specific examples vary.

Concepts with parts and boundaries are concrete concepts. Less tangible concepts that cannot be illustrated with a diagram are abstract concepts.

### Examples of Concepts

The following are concepts (classes of items that share common features and are known by a common name):

- Fish
- Router
- Qualified customer

## Non-examples of Concepts

The following are NOT examples of concepts:

- Logging into the database application. (This is a PROCEDURE, a content type that we discussed in the previous issue; logging in consists of a series of defined steps – or a defined procedure.)
- The speed of throughput for a particular router. (This is a FACT, a content type that we will discuss in a future issue; facts can be used to define concepts.)

## How to Teach Concepts

While concepts can be learned at the remember level by memorizing the definition, this is not recommended since the purpose of learning a concept is to use it to classify objects, analyze, make judgments, discriminate, etc.

Information for teaching concepts should be displayed as definitions, examples, non-examples, and analogies.

**The Definition:** A definition is a statement of the critical features associated with a concept. Use definitions to help students better understand the critical features. For example, the definition of a fish would be: “Any of three classes (jawless, cartilaginous, and bony fishes) of cold-blooded vertebrate animals living in water and having fins, permanent gills for breathing, and, usually, scales.”

**The Example:** An example is a real instance of the concept. Make the concept definition real by illustrating with examples. In the fish example, show big fishes, little fishes, and odd-shaped fishes. If the concept is complex, you may wish to provide several examples, each of which contains all of the critical features and in which irrelevant features are systematically varied one at a time.

**The Non-Example:** A non-example can illustrate the critical features of a concept. For the concept of fish, a non-example could be a dolphin since it contains many of the critical features of the concept — and could be easily confused as an example — but varies on at least one critical feature.

Examples and non-examples for concrete concepts take the form of pictures or diagrams while examples for abstract concepts need to be presented verbally. Initial examples should reflect typical instances that systematically vary one feature at a time while later examples call on less common instances.

**The Analogy:** An analogy is a representation that corresponds with a concept in function or form but is otherwise dissimilar. Using the human brain to explain how the central processing unit of a computer works might be a useful analogy. Analogies are efficient instructional techniques because they allow the learner to build on what they already know.

Learning objectives should begin with the application-oriented verbs such as: select, analyze, contrast, distinguish, and validate. Avoid remember-oriented verbs such as: define, describe, and identify.

Learning activities should include discussion, diagrams, classifying games, and verbal explanations.

The suggested learning/teaching sequence is as follows:

1. Define the concept.
2. Provide examples to illustrate common characteristics.
3. Provide non-examples to further identify characteristics.
4. Use diagrams for concrete concepts; use verbal explanations for abstract concepts.
5. Ask students to classify objects into their category.
6. Provide feedback.

Practice should include asking students to correctly identify the new concepts from a group of valid and non-valid examples.

### How to Assess Learning

To evaluate concept learning, measure the participant's ability to classify unknown items. Format assessment questions like the practice exercises but with new examples. Have students choose from examples.

Especially for complex concepts, post-evaluation discussion yields valuable learning. Discussing why some of the choices are examples of the concept and others are not further cements the concept in participants' minds.

Sometimes a simulation is useful in replicating “the real world” where the concept must be applied (e.g., qualified customer, eligible for a refund, “gold customer”). Simulations can test a learner’s ability to apply concepts within a larger context.

In upcoming issues of *The Key*, we’ll continue stepping through the three remaining 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 Impact 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](http://www.unlockit.com) or contact me directly at <mailto:ttraut@unlockit.com>.

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### CALL FOR INSTRUCTIONAL DESIGN AND DEVELOPMENT SHORTCUTS

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We are putting the final touches on our latest eGuide, *Practical Instructional Design*. This guide will provide professional and non-professionals alike the guidelines, shortcuts, and proven techniques for creating quality training.

One of the tips we’re advocating is leveraging your colleagues. And that’s what I’m doing right now! If you have a design or development tip, shortcut, or suggestion, write in. For your contribution, you will be listed prominently in the eGuide Contributors section AND you will receive a complimentary copy of the finished product!

All you have to do is email me your tip(s) along with your name – and company if desired. Click here: <mailto:ttraut@unlockit.com> and join the fun!

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