

Custom Program Title

Leader's Guide

Module 1 Your DiSC® Management Style: Part I

Module 2 Your DiSC® Management Style: Part II

Module 3 Directing & Delegating

Module 4 Motivation

Module 5 Developing Others

Module 6 Working with Your Manager

Module 3: Directing and Delegating

Everything DiSC® Management

MODULE OVERVIEW

Length: 60 minutes

Activities:

- Individual
- Partner
- Small Group
- Large Group

Materials:

- Handout 3.1
- Handout 3.2
- *Everything DiSC® Management Profile: Directing and Delegating section*
- *Management Interaction Guides*

Goals:

- Learn about your natural directing and delegating style.
- Identify the directing and delegating needs of different people.
- Write an action plan for improving how you direct and delegate to a person you manage.

Activity Description:

Participants explore their perspectives on directing and delegating. They read about their directing and delegating styles and discuss their strengths and challenges. They watch video segments showing ineffective directing and delegating approaches for four employee styles. They discuss in a large group what was ineffective, then watch a follow-up segment that demonstrates a better approach. Finally, participants use people reading to figure out the DiSC® style of someone they manage. They read about directing and delegating to that style, and they write action plans for improving their approaches.

PPT
1

WELCOME

STEP 1: DEFINE THE PROBLEM AND ACTIVATE PARTICIPANTS' EXPERIENCE

5 minutes: Individual Activity

Participants explore their perspectives on directing and delegating.

SAY:

- Directing and delegating to the people you manage are basic, daily activities of management.
- Yet, each of you may approach directing and delegating differently.

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2

INSTRUCT:

- [🗒️] Using the post-it notes in the center of your table, take a minute to write down words or phrases that you associate with directing and delegating.

Give participants a minute to write.

ASK:

- Could I have someone tell me what you wrote?



Flipchart until all unique responses are reported. Point out common themes as well as similarities and differences. Facilitate a brief discussion.

SAY:

- No matter what your perspective, you may find it easier to direct and delegate to some people than others because one approach doesn't work with every style.
- By getting a better understanding of how your management style fits with the needs of the people you manage, you will become more effective at directing and delegating.
- [🔗] This section will show you how to use your Everything DiSC® Management Map to
 - Learn about your natural directing and delegating style.
 - Identify the directing and delegating needs of different people.
 - Write an action plan for improving how you direct and delegate to a person you manage.
- Let's start by learning how your management style influences the way you direct and delegate.

PPT
3

STEP 2: DEMONSTRATE AND PRACTICE

35 minutes: Small Group Activity; Large Group Activity with Video

Participants watch video segments showing ineffective directing and delegating approaches for four employee styles. They discuss in a large group what was ineffective, then watch a follow-up segment that demonstrates a better approach.

PPT
4



Profile

INSTRUCT:

- [🔗] I'd like you to open your *Everything DiSC Management Profile* to the Directing and Delegating section (*page 7 in the full report*).
- Read about your directing and delegating style, including your potential strengths and challenges.
- Personalize your feedback by putting a checkmark next to things that are like you, an X by things that are not like you, and a question mark next to things that you aren't sure about.

Give participants 2-3 minutes to read and personalize.

PPT
5



INSTRUCT:

- [🗣️] Now, take a moment to put stars next to one strength and one challenge from the bulleted lists that you feel best describe your experiences when directing and delegating.
- Then, at your table, tell each other the strengths and challenges that you starred.

Give participants 2-3 minutes to discuss.

ASK:

- What did you find interesting?

Take a variety of responses.

SAY:

- As you learned, the areas you prioritize influence the way you direct and delegate. However, the needs and preferences of the people you manage may not always align with your priorities.
- DiSC® can help you understand and anticipate the effects of the differences and similarities between you and the people you manage.
- Let's take a look at four people who have different directing and delegating needs.

NOTE TO FACILITATOR:

If participants have questions about the style of Charles, the manager, during the following video activity, let them know that he isn't portraying a specific management style.



HO 3.1

SAY:

- We'll start by watching an interaction between Carlos, who has a D style, and his manager, Charles.
- Use Handout 3.1 to take notes on the video and our discussion.

PPT
6

[🗣️] *Video segment "Directing & Delegating to 'D.'"*

PPT
7

ASK:

- [🗣️] What did Charles do that was ineffective with Carlos?
- What did you observe about Carlos that let you know it was ineffective?

Listen for: He gives Carlos overly detailed instructions without providing the big picture; he dismisses Carlos' questions and concerns without providing his reasoning; he micromanages Carlos by giving him a routine task and telling him he will check on his progress a few hours later.

Observations: Carlos shows annoyance and frustration; he states that he doesn't see the need for changes and agrees to do them reluctantly; he gets up to leave when he's had enough.

SAY:

- Now let's watch Charles use a more effective approach with Carlos.

PPT
8

[🔊] Video segment **"Adapting to 'D.'"**

PPT
9

ASK:

- [🔊] What did Charles do differently?

Listen for: He lets Carlos know right away that the report is for a board meeting; he shows confidence in Carlos' abilities; he provides big-picture reasons to account for the changes and directions; he conveys a sense of urgency and gives Carlos autonomy on how to address the issues.

SAY:

- Now let's watch an interaction between the same manager, Charles, and Anna, who has an i style.

PPT
10

[🔊] Video segment **"Directing & Delegating to 'i.'"**

PPT
11

ASK:

- [🔊] What did Charles do that was ineffective with Anna? What did you observe about Anna that let you know it was ineffective?

Listen for: Charles gives a complex assignment just before leaving; he knows that she has no experience, but he doesn't give her structure or parameters; he gives her piles of information and assumes she will process it; he mistakes her cheerful acceptance for understanding.

Observations: Anna tosses the notebooks onto her desk without looking at them; she asks no questions even though the instructions are vague and she's never done it before.

SAY:

- Now let's watch Charles use a more effective approach with Anna.

PPT
12

[🔊] Video segment “**Adapting to ‘i.’**”

PPT
13

ASK:

- [🔊] What did Charles do differently?

Listen for: *After determining she has never planned the event before, Charles puts support in place to set her up for success; he suggests a collaborative meeting before he leaves town; he gives her specific benchmarks and timelines.*

SAY:

- Next, let’s watch an interaction between Charles and Christiana, who has an S style.

PPT
14

[🔊] Video segment “**Directing & Delegating to ‘S.’**”

PPT
15

ASK:

- [🔊] What did Charles do that was ineffective with Christiana? What did you observe about Christiana that let you know it was ineffective?

Listen for: *Charles is impatient and negative; he criticizes Christiana for not moving ahead when he never communicated the need to do so; he gives her a tight deadline without the support and resources she needs to meet it; he fails to provide the specific direction Christiana wants.*

Observations: *Christiana is obviously surprised and uncomfortable when Charles asks her about the project; she repeatedly asks for clarification and looks more and more worried when she doesn’t get it; she says “OK” but shakes her head, showing that she doesn’t know how to get it done.*

SAY:

- Now let’s watch Charles use a more effective approach with Christiana.

PPT
16

[🔊] Video segment “**Adapting to ‘S.’**”

PPT
17

ASK:

- [🔊] What did Charles do differently?

Listen for: *Charles meets with Christiana two days earlier to inform her of the project and give her time to work; he empathizes with her uncertainty and reassures her; he provides clear examples of how he’d like the template and summary amended; he compliments her work.*

SAY:

- Finally, let's watch an interaction between Charles and Michael, who has a C style.

PPT
18

[🎧] Video segment **“Directing & Delegating to ‘C.’”**

ASK:

- [🎧] What did Charles do that was ineffective with Michael? What did you observe about Michael that let you know it was ineffective?

PPT
19

Listen for: Charles fails to provide details about what doesn't work with the document; he insists on a team project when Michael believes it would be handled better individually; Charles is vague and doesn't provide direction on finding resources.

Observations: Michael probes for the information he needs, and when Charles fails to provide it, he shakes his head and sighs even though he agrees to try; he asks for a process and refers to the frustration of having to do work over last time; he acts restrained but annoyed at Charles' failure to provide information on the location of the files.

SAY:

- Now let's watch Charles use a more effective approach with Michael.

PPT
20

[🎧] Video segment **“Adapting to ‘C.’”**

ASK:

- [🎧] What did Charles do differently?

PPT
21

Listen for: Charles provides details about what needs more work in the document; he cites examples of Michael's good work; he is more flexible about Michael's preference to work alone; he asks for input on a work process; he provides clear direction and resources.

STEP 3: PRACTICE AND INTEGRATE

20 minutes: Individual and Partner Activities

Participants use people reading to figure out the DiSC® style of one of their employees. They read about directing and delegating to that style, and they write action plans for improving their approach with that person.

NOTE TO FACILITATOR:

If participants haven't already received the *Management Interaction Guide* in a previous module, distribute one to each participant now.

PPT
22



Profile

INSTRUCT:

- [🔒] Now turn to the pages about directing and delegating to D, i, S, and C in the Directing and Delegating section of your profile (*pages 8-11 of the full profile.*)
- Take a minute and look over one of the pages to get familiar with the kind of information that's provided for each style.

Give participants a minute to look over the pages.

SAY:

- Let's take a look at how you can use these pages and your *Management Interaction Guide* to get better outcomes with all the people you manage.

PPT
23



HO 3.2

Management
Interaction
Guides

INSTRUCT:

- [🔒] To start, think about someone you manage and write his or her name at the top of Handout 3.2.
- Now, using the *Management Interaction Guide*, let's walk through the people-reading process to determine your employee's style.
- First, consider whether this person is **fast-paced and outspoken** or **cautious and reflective**. (*Pause briefly to allow participants to reflect.*)
- Now, consider whether this person is more **questioning and skeptical** or **accepting and warm**. (*Pause briefly to allow participants to reflect.*)
- [🔒] Finally, combine your employee's tendencies to determine his or her DiSC® style and write it at the top of Handout 3.2.
- For example, if the person is fast-paced and outspoken plus questioning and skeptical, write D-Dominance at the top of the handout. But if the person is fast-paced and outspoken plus accepting and warm, write i-Influence.

Give participants a minute to finish the people-reading process.

PPT
24

PPT
25



Profile



HO 3.2

INSTRUCT:

- [🔗] Next, go back to the Directing and Delegating section of your profile and find the page about directing and delegating to this employee's style (*pages 8-11 in the full report*).
- Keep in mind that many people are a combination of styles, so you may want to look over more than one page if you think this person may fall between two styles.
- Using your profile as a guide, follow the steps on Handout 3.2 to write out an action plan for adapting your style to improve how you direct and delegate to this employee.
- You may begin.

Give participants 10-12 minutes to complete the action plan.

PPT
26



INSTRUCT:

- [🔗] Now, I'd like you to find a partner and discuss your action plans.
- Give any additional advice or feedback that you believe would help the situation.

Give participants 3-4 minutes to discuss.

ASK:

- What did you discover about yourself or the person you manage through this process today?

Take a variety of responses and facilitate discussion.

PPT
27

SAY:

- [🔗] You now have a simple process for improving how you direct and delegate to all kinds of people.
- DiSC® can help you understand the priorities and preferences of the people you manage so you can be more effective.

NOTE TO FACILITATOR:

If you are doing this program over an extended period of time and are taking a break after this module, you may want to provide extra copies of Handout 3.2 for a practice assignment. Ask participants to complete the people-reading and action-planning process on one or two more employees before the next session.