



Socratic Delegation Step-by-Step

STEP #1 – Identify the task or project

STEP #2 – Clearly identify the measurable results/outcome and time frame. (By the way, this is often the culprit of problems. If you don't clearly define how to measure success, how is your employee to know?)

STEP #3 – Meet with the employee or team to whom you are delegating and have the following conversation:

"Here's an overview of the work and why it needs to be done."

The why of what you're delegating is very important. People are more likely to become engaged in their work if they know why they're doing it. The Millennials in particular want to understand why.

"Here is the end result I am looking for _____ and here is the date I need it _____."

"Would you walk me through how you think it should be done?" –OR- "How do you think we should approach this?"

Listen and *only* listen until the end. Take notes.

Don't interrupt; if you identify a problem and interrupt to mention it, you may also interrupt the employee's thought process. Also, it is likely that the employee will, while talking through the task, identify the very problem you noticed and correct it. This is the ideal scenario.

Step # 4 – Fine tune

If, while the employee(s) was outlining his plan you noticed any potential concerns, bring them up. Use questions:

- How will you get to that point?
- Where are those resources coming from?
- Help me understand...
- What tools are you planning to use?
- What obstacles might stand in the way of getting this done on time?
- Etc.

This fine-tuning process is your opportunity to coach the employee and develop his skill level. Additionally, this is also an opportunity for you to learn some approaches you hadn't thought of yourself. It gives you a perfect opportunity to acknowledge the team or employee for their critical thinking.

Before delegating to any member of your team, be certain that YOU are clear about Steps 1 and 2 repeated below:

STEP #1 - Identify the task or project

STEP #2 - Clearly identify the measurable results/outcomes and time frame.

Each step is *critical* to achieving success.