



Socratic Delegation Step-by-Step for Project Managers

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 team member to know?)

STEP #3 – Meet with the team member or team and have the following conversation:

"Here's an overview of the project 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 we need _____ and here is the when we 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 team member's thought process. Also, it is likely that he or she 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 team member was outlining his plan you noticed any potential concerns, bring them up. Use questions:

- How will we get to that point?
- Where are those resources coming from?
- Help me understand...
- What tools do you plan 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 team member and (added bonus) develop his skill level. Additionally, this is an opportunity for you to learn some approaches you hadn't thought of yourself. It also gives you a perfect opportunity to acknowledge the team or individual 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.