

Setting Expectations



"What do you call work?"
 "Why, ain't *that* work?"
 Tom resumed his whitewashing, and answered carelessly:
 "Well, maybe it is, and maybe it ain't. All I know, is, it suits Tom Sawyer."
 "Oh come, now, you don't mean to let on that you *like* it?"
 The brush continued to move.
 "Like it? Well, I don't see why I oughtn't to like it. Does a boy get a chance to whitewash a fence every day?" "

Mark Twain -
 The Adventures of Tom Sawyer, 1875.



Nelson, B. (1997). 1001 Ways to Energize Employees. Workman Publishing, NY

Review this guide and complete the preparation check list



Managers, team leaders, or peers who depend on others for quality performance and outcomes

At the start of a new assignment, to raise a performance level, or to re-set expectations that have fallen short. Frequently, not annually!



To set clear staff expectations for specific work assignments or several performance requirements



Cautions:

1. Failure to prepare
2. Misunderstanding the skill or motivational level of the person

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The number one requirement for improving performance, based on the famous Gallup study's 12 questions survey, is a clear understanding of one's job expectations. Every employee at every level in an organization must answer Strongly Agree to the statement: 'I know what is expected of me at work.' Here are some tips on how to set expectations with others. Three steps take place:

1. Preparation
2. Discussion
3. Follow-up

Preparation check list - Objective of the assignment or task:

Circle Yes or No for each question. Before you meet to set expectations with someone, prepare to answer or prepare your checked NO's.

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|-----|----|---|
| Yes | No | 1. Why? I know why this task or these assignments link to the organization's objectives and mission and I can briefly explain that. |
| Yes | No | 2. Where? I know the location of the assignment or task. |
| Yes | No | 3. When? I am clear on the timeframe for this task and/or I am willing to negotiate the best schedule for all involved. |
| Yes | No | 4. I know and can explain to others the consequences if this work is Not completed well. |
| Yes | No | 5. I am clear on the skill level of my staff member for the task. |
| Yes | No | 6. I am clear on the motivation level of my staff member to do this task well. |
| Yes | No | 7. I can identify resources for the staff member and provide materials and equipment as needed. |
| Yes | No | 8. I want this person to be successful. |

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| Yes | No | 9. I know the cost of employee failure in this situation. |
| Yes | No | 10. I can identify possible measures for the outcomes of the task. |
| Yes | No | 11. I am confident that this assignment is included in the employee's job description and/or performance objective.
(Consider whether revisions are needed to reflect new priorities or tasks.) |
| Yes | No | 12. I know which style I plan to use in my discussion.
(Select one of four possible styles, see below.) |

Preparation – Select one of four possible styles

Depending on the task, skills, and maturity of your staff member, you may choose from these four styles to set expectations. Sometimes you need to combine the styles as you learn more about the person and his or her situation.

1. Directive: Mirror the expectation by showing a correct sample document, computer screen, or have someone demonstrate the behavior. Ask the staff member to repeat the instructions in their own words to assure you were clear and the person understood the correct standards.
2. Explorative: Discuss the optimal outcome with the staff member. Paint a vivid picture together of the end result. Articulate what people will say and feel about the result. Agree on the approach.
3. Quantitative: Agree on specific measures of the goal or outcome (budget, amounts, percentages, etc.)
4. Motivational: Choose this approach when the individual has the skill and experience to do the task but lacks the interest or motivation. Let the staff member know his/her contribution is needed for the success of the team and ask them what they might learn and/or benefit from completing the task. Understand the team member. Find out about the team members' interests, habits, sensitive areas, preferred problem-solving methods, and then use this knowledge to provide the resources required to make the best use of their strengths.

Discussion guidelines - How to approach the actual discussion

1. Check-in on priorities and work agenda of the staff member to calibrate their ability to manage a new assignment.
2. Give the staff member the WHY of the task, the big picture, and an overall purpose. Link the assignment to the organization's mission when possible. Emphasize its importance.
3. Ask about the employee's knowledge, confidence, and skill level for the assignment. Confirm with the employee his or her level of experience.
4. Relate the task to the person's responsibilities as outlined in the job description.
5. Use either a directive, exploratory, quantitative, or motivational style as you discuss the task(s).
6. Describe your desires for:
 - Communication methods and audiences
 - Initiative and problem solving freedom or constraints
 - Teamwork goals and levels of involvement
 - Feedback and communication needs from you as the boss
7. Explain the timeframes, place, equipment, and resources. Negotiate the timeframe with the individual based on what you learn, yet without compromising the priority status of the task.
8. Ask: "Do you know the consequences if this work is Not completed?"
9. Ask: "What will success look like for this task?" Decide on possible measures for the outcomes of the task.
10. If necessary, have them describe how they will proceed and encourage good judgments and approaches. Ask: "Do you have any hesitations?"
11. Ask: "What will you learn from this?"
12. Clarify spending limits and authority levels.
13. Set a follow-up or progress check.

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Follow-up

- A. Have the individual report on the completion of the task and the lessons learned. If it is a routine task, ask how the process might be improved or how the person will sustain his or her attention and motivation.
- B. Have the individual evaluate the project based on measures and planned outcomes.
- C. Ask: "Did I set these expectations well for you or did I miss something?"
- D. Check for discrepancies between outlined responsibilities and current assignments.
- E. Offer specific positive feedback as warranted.
- F. Make corrections. Understand that mistakes are opportunities for learning, not a basis to point blame.



- Practice setting expectations and make improvements as you learn.
- Allow for enough time to have the conversation.