

Setting Expectations

A people leader’s guide to setting teammate expectations

WHY SET EXPECTATIONS

When we set expectations for our team, we inform them of how they contribute and impact the organization within their position, as why it is crucial that everyone play their part. Otherwise, teammates can become lost in their direction, confused, and even disengaged. Expectations empower teammates in their positions and create a road map for them to be successful.

Setting expectations high, but reasonable, generally supports a high-performing team. Teammates strive to achieve expectations and average performance may go up. When set correctly, expectations can inspire and challenge teammates to stretch themselves and expand their capabilities.

HOW TO SET EXPECTATIONS

Set expectations early: Any time you have a new teammate you should schedule 1 on 1 time with them to go over expectations. This should be done as part of the on-boarding process, and as close to day 1 on the job as possible. Additionally, dedicating a 1 on 1 at the beginning of every year is another great way to re-visit expectations, especially as goals and focus can change from year to year.

Understand the “why”: Communicating *why* something needs to be done can increase the drive and motivation needed for success. With a clear understanding of why we are doing something and how it is contributing to the bigger picture, engagement can increase, behavior can change, and goals and responsibilities can be met.

Make expectations simple and clear: Ensure that both you and the teammate can answer what you want the outcome to be and what the steps are to achieve that outcome. This process should also ensure the expectation is realistic. Break things up into four categories: work responsibilities (detailed task list specific to the position), culture (organizational purpose, values, behaviors, and environment), communication (your style), and performance expectations (results, behaviors, and actions) to ensure you cover every aspect of their role and contribution to the team.

Dedicate time: Opening a conversation about expectations ensures that a teammate has everything they need to be successful and meet expectations. A good rule of thumb is to visit expectations at the beginning of each year, during the Annual Performance Review period. This is a great time to evaluate their contributions, performance, and if you need to reset for the year ahead. For someone who needs expectations reset, ensure you are following up regularly to give feedback on progress, at least one or two times a month.

Active listening: If someone is not meeting expectations, you should ask questions that allow you to be engaged in active listening. Active listening entails focusing on the teammate, understanding what they are communicating, and then responding thoughtfully. This will allow you to understand from their perspective why they have not been meeting expectations. This can help inform how you need to get them back on track, and what type of coaching should take place.

Measure growth: There should be a deadline set to show growth and/or improvement. This is especially important when you have a new teammate, or a teammate who you need to reset expectations with.

Documentation: In-person conversations are great and highly encouraged. It is also recommended to always follow up conversations with documentation. Documentation can be notes for your own record of the conversation and can also be in the form of an email to the teammate summarizing the conversation. This ensures that the teammate has record of the expectations as something to refer to and that you have record to refer to as well.

THINGS TO CONSIDER

After clarifying and setting expectations, it's important to run through a checklist to ensure you and your teammate fully understand the expectations.

Below are items to consider:

- ✓ I have been clear in setting expectations because I have had a conversation with my teammate, and I have tested their understanding of the expectations.
- ✓ I have told my teammate what they can expect from me as their People Leader.
- ✓ My team knows what is expected from each other because expectations of the culture have been made clear.

SUMMARY

Communication surrounding expectations is vital for a strong organization and culture. When expectations are communicated with clear direction, there is more accountability, and teammate ownership can be further developed. Expectations enhance relationships between teams, and teammates are more confident in their position and leader.