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# Defining Expectations Handouts

“Inspect what you expect.”

**Participant Name:** \_\_\_\_\_

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## **Business Outcomes of the workshop**

By developing the skill of defining expectations, we will:

1. Increase the **quality** of our teammate's performance.
2. Increase our teammate's engagement.

## **Agenda**

1. What is it like when you don't meet your boss's expectations?
2. Who isn't performing to the expectations?
3. Key Steps for Defining Expectations
4. Example – Defining Expectations
5. Expectation Planning form
6. Skills Practice
7. Insights
8. Appendix review
9. Assignments

## **2 situations where the performance wasn't what I expected to be are the following:**

Team member 1:

Situation:

Team Member 2:

Situation:

## Performance Standards

### Performance Standards:

- Provides a teammate with specific expectations for the tasks that make up each job duty.
- The foundation for assessing performance.
- Is the minimum level of acceptable performance.

### Guidelines

- To be effective, performance standards should include two components:
  - A clear description of work to be accomplished
  - Details on how performance will be measured (quantity, cost, timeliness, etc.) It must be a measurement.

**Task + Measurement = Performance Standard**

Job	Job Duty	Task – “AKA” Work to be Accomplished	+ Measurement	= Performance Standard
<b>Administrative Assistant</b>	<b>Office Support</b>	Open the People Services office.	<i>at 8:00 am</i>	Open People Services office at 8:00 a.m.
	<b>Preparation of Materials</b>	Assemble training materials.	<i>within two working of days of request and 100% accurate</i>	<i>Accurately assemble training materials within two working days of request.</i>

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## Setting Performance Standards Exercise

### Instructions

1. Write down one of the job duties of a teammate who reports to you.
2. List the tasks that make up that job duty.
3. Develop performance standards for each task.

<b>Job Duty</b>	<b>Task – “AKA” Work to be Accomplished</b>	<b>+ Measurement</b>	<b>= Performance Standard</b>

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## **Key Steps for Defining Expectations**

### **1. Define the WHY of the task, project, or behavior and the desired outcomes.**

Let the teammate know what completing the task, project or behavior looks like, its purpose, and how it connects to the big picture. *Be detailed and specific.* Discuss with the teammate whether or not the specific task *allows for initiative* or new ideas. In some cases, you may want to define exactly the specific steps needed to complete the work.

### **2. Review the performance standard(s) for this task, process or project.**

Share with the teammate the measurable performance standards. Ensure there is a mutual understanding that meeting the standards consistently is demonstrating proficiency with their tasks or projects. Some measurements are to be below or meet the budget. Other examples are: 100% error free work, 100% accuracy with the steps completed, on time based on the assigned deadline, within 3 days of being given the task.

In this step, we are communicating the performance standard. A standard is **the minimum level of acceptable** performance. Standards are not the same as goals. **Goals** are **higher** than our standards. In this step, we want to ensure teammates understand the standard, not the goal.

### **3. Confirm understanding.**

Ask the teammate to recap or summarize their understanding of the expectation. This is done for two reasons; first to ensure you didn't forget any details and also to see if the teammate is clear in his/her understanding of the expectation. Allow the teammate to ask questions and clarify the information at this time as well.

*Then ask the teammate if there is anything that will prevent them from accomplishing the task.* Observe the teammate's body language. Does his/her posture or eye contact suggest discomfort with the expectations? If so, acknowledge and explore his/her feeling to remove potential obstacles.

### **4. Provide training (if this is a new task).**

**5. Monitor and review progress.** Schedule a follow up meeting to discuss his/her progress. During this meeting, have the teammate provide an update and then ask if there are any barriers to his/her success with the task. If there are, brainstorm solutions with the teammate.

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## **Defining Expectations Example**

### **1. Define the WHY of the task, project, or behavior and the desired outcomes.**

“Hi Evelyn. Today I wanted to take a few minutes to talk about our expectations for engaging with students and teammates because I'm not sure I've been very clear in past conversations. And I'd appreciate it if you took notes so you can recall our discussion. Thank you. As we interact with students and our teammates, the expectations are to make eye contact, smile, and refrain from multi-tasking during the interaction. There is also an expectation that we provide enough detailed information to meet the student's or our teammate's needs. The purpose of this is to convey that we are interested in them, we respect them, and we have a sincere desire to assist them. This is important because delivering excellent student care and creating a team environment are key drivers of our success.”

### **2. Review the performance standard(s) for this task, process or project.**

“With having successful student and teammate interactions, we have several standards to follow. Our first standard is to make eye contact and smile when you are within 5 feet of the student and to stop multi-tasking within 30 seconds of making eye contact. The standard for providing enough detailed information is that you provide a minimum of 3 pieces of key information pertaining to their question. In **100% of your interactions**, the question of, “Have I given you the information you needed to know?” will be asked. That question will ensure we've either met their need or not.

### **3. Confirm understanding.**

“To be sure I was clear and didn't overlook anything, share with me your understanding about the expectation of engaging with students and teammates.”

*Pause and listen.*

“Now, is there anything that will prevent you from accomplishing this?”

### **4. Provide training.**

### **5. Monitor performance and review progress.**

“As you get more acclimated to your role, I'd like you to touch base with me each week for the next 3 weeks to discuss how you're doing meeting this expectation. Thanks.”

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## Defining Expectations: Planning Form

Three people and tasks I need to define/redefine performance expectations for:

- 1.
- 2.

**Key Step 1: Define the WHY of the task, skill, or behavior and the desired outcomes. What will I say to each teammate? Let them know if they can take initiative or not.**

Teammate 1:

Teammate 2:

**Key step 2: Review how performance will be measured.** There must be a numeric measurement in this key step.

Teammate 1:

Teammate 2:

**Key Step 3: Confirm understanding. Example:**

"To be sure we're on the same page, tell me your understanding of the expectation."

**Key Step 4: Provide training if a new task.**

Teammate 1 – Yes/No      Teammate 2 – Yes/No      Teammate 3 – Yes/No

**Key Step 5: Monitor and review progress. When will he/she follow up with me?**

Teammate 1:

Teammate 2:

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## **Reflections**

What are the most important insights you gained from our discussion today?

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# **APPENDIX**

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## **Example – Welcome letter that defines expectations**

Dear \_\_\_\_\_,

Welcome to the \_\_\_\_\_ team. We are excited that you've chosen us as your employer and we are looking forward to you joining our team. As you prepare for your first day, I wanted to take this opportunity to let you know a little bit about who I am, the team and how we operate.

### **About Me**

I have worked at \_\_\_\_\_ for \_\_\_ years. I held a few positions in the organization before advancing to my latest role. I AM PASSIONATE ABOUT FUNDRAISING and have a drive for excellence. When I say, drive for excellence, the behavior I exhibit is in giving a lot of feedback to ensure we are all giving our best effort and producing quality work. I share this with you since it may not have come across in the interview and for some, it can take some time getting used to me since most people aren't used to receiving the amount of feedback I like to give. I can also be very practical in my approach to work. That doesn't mean I don't want to hear innovative ideas.... it's just best to give me advanced notice (a meeting appointment) when you'd like to brainstorm. Lastly, I believe in being a team and working through any issues on the team in a quick and transparent way. Again, this may not be something you're accustomed to with your previous employer and for me, it's critical. When left unaddressed, issues can snowball and we don't have time for that. Everyone wants a great work environment so we all need to keep working at that with one another because we are here to serve our students.

### **Our Team**

As for our team, each person has their own set of unique strengths. They are a fun team! It will be important for you to build trusting relationships with each teammate within your first 120 days as you're learning your role. On this team, we can be like a family, close and we also fight at times – the bottom line is we work hard, have a lot of respect each other and the team knows we need to work out our differences when they arise quickly.

### **How we Operate**

We are fast paced. We are about serving our students to the best of our abilities. It's not just about getting the work done, it's about **how we get** the work done. We believe in our core values and in embodying them, we will fulfill on our vision of becoming the greatest learning community the world has ever seen. With appreciation, \_\_\_\_\_

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## **OPTIONAL Assignments**

Between now and the next session,

1. Practice defining expectations with the 2 situations you completed on your planning form.
2. E-mail me at [Marisa@szemzem.com](mailto:Marisa@szemzem.com) with :
  - a. What **you said** for each key step.
  - b. Your overall impression of how the conversation went.