Setting expectations: A checklist to save yourself from "but that's not what I wanted"

Ever have a team member disappoint you with their behavior or work? It's easy to blame the other person. But often the reality is that if someone's not delivering what you wanted, it means that you, as the leader, haven't done a good enough job communicating your expectations.

One key to setting great expectations: Understanding that what you want is only part of the equation. Instead, think of the process as a two-way discussion. The goal is to achieve a match between what you say and what the other person hears and does so there's crystal-clear mutual understanding.

That may sound easy, but it's actually hard to do well, especially in the chaos of a busy workday where it's tempting to skip steps or communicate in shorthand. Instead, use this checklist to get the performance you're looking for.

Consider your perspective

☐ **Assess your own feelings about the issue at hand.** Are you anxious about the project you're assigning because it's going to make or break your team's performance this quarter? Are you annoyed about a team member's behavior because you see them competing with teammates, rather than collaborating? How you feel can influence (consciously and unconsciously) how you set and communicate the expectations—for example, if you're anxious you could come across as untrusting.

☐ **Write out what you want from the other person to clarify your thinking.** Use specific language to describe what a successful outcome looks like to you. This could mean you write *"Once your pipeline is full, I'd like you to share extra leads with someone who needs them,"* rather than just "I'd like you to stop competing with others." Or for a deadline, *"I'd like the revised report by Wednesday at 2:00 p.m."* instead of "I'd like the report Wednesday," which could have the person sending you a rough draft at 6 p.m. When delegating projects, include key details like project objective, expected outcome, relative priority, and how often you want updates (use our [Delegation task outline](#) for a simple step-by-step).

Consider the other person's perspective

☐ **Factor in the other person's skill level, challenges, and relationship with you.** If you have a strong working relationship, it may be easier to stay in sync about what you want. If they are new to the team or you've experienced missed expectations before, be ready to provide more details at the outset and more guidance along the way. Also consider details that could impact the person's ability or willingness to meet your expectations, like skill level, current workload, personal challenges, and career goals and motivation. Before you proceed, do a gut check: Are your expectations a good fit for this recipient? If not, consider what needs to change.

☐ **Determine a communication style that that will help the person hear your expectations.** Choose a delivery—direct, gentle, coaching, etc.—based on what you know about the person. And no matter how you say the words, use a friendly but firm tone of voice and [open body language](#) to underscore your meaning, not undercut it. (Imagine a manager saying, "I'd love your input on these expectations," with arms crossed and eyes focused on your computer monitor— not very inviting.)

Have a dialogue about your expectations

☐ **Share context about why you have these expectations.** This could involve including your feelings about the issue (*"I really value team collaboration—it's a core part of our team culture"*), how the issue connects to the big picture (*"When you miss your deadline, it reduces the product team's time, which ultimately increases the likelihood of a delayed launch"*), how a task contributes to a team goal (*"This is an important part of our effort to increase repeat customers"*), or other factors.

☐ **Use specific language to clarify what you want from the person.** Use your written expectations (from the "Consider your perspective" section above) as a guide. And challenge yourself to make each statement as explicit as possible, using clarifying phrases (e.g., *"What I mean is…"*). For example, *"When I say the report should be 'thorough,' what I mean is that it should include our quarterly results for the past year, a competitive analysis, and our product roadmap."*

☐ **Ask the other person to share their perspective.** Because of the power dynamic, some team members don't feel comfortable commenting on a manager's directions unless asked. Invite comments early in the conversation to signal you'd like a dialogue. Depending on the situation, you could try phrases like, *"I'd love your input on this—what do you think?"* or *"I'm open to other approaches—what do you think is the best way to accomplish this?"* or *"What resources do you need to deliver these results? What challenges do you anticipate? Does this sound doable, given all the other things you're working on?"* Allow time to hear the other person's view, and brainstorm together how to address any concerns.

☐ **Use clarifying questions to ensure that you and the person understand each other.** Just as you've been explicit in explaining your expectations, ask the other person to do the same in describing their view. Start with, *"What have you understood from this conversation?"* Then, as needed, follow up on details to be sure that the language being used means the same thing to both of you. For example, *"What does 'done' mean to you?"* or *"When you say you'll be delayed because the software is 'too clunky,' what do you mean by that?"*

Follow up

☐   **Recap in writing within 24 hours.** Especially for complex or important issues, send a follow-up email including a thank-you and detailed list of mutually agreed-on expectations from your discussion. This may sound like overkill, but it does two important things: It gives the other person the opportunity to clear up initial misunderstandings. And it provides a record you can refer back to at any time to gauge progress and assess performance.

☐   **Reinforce and/or recalibrate expectations by giving ongoing feedback and modeling the performance you're looking for.** Setting expectations is not a one-time event—it's an ongoing process. Even with a written record of your initial expectations, people forget things, stuff changes, or something might get misinterpreted along the way. Reinforce your expectations by modeling what you've asked for and repeating your message regularly, for example, *"Collaboration is key on this team."* And when you see performance that meets your expectations, [give reinforcing feedback](). Or if you see behavior slipping, [give redirecting feedback]().