



**CultureWise**<sup>™</sup>  
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## SAMPLE TEACHING CONTENT

**Fundamental: GET CLEAR ON EXPECTATIONS.**

## GET CLEAR ON EXPECTATIONS.

Create clarity and avoid misunderstandings by discussing expectations upfront. Set expectations for others and ask when you're not clear on what they expect of you. End all meetings with clarity about action items, responsibilities, and due dates.

## QUICK TIPS

### Sent out daily as push notifications on the phone:

- Remember that we don't judge situations by what happened, we judge them by how they compared to what we *expected* to happen. Do you know what the other person is expecting? Does the other person know what you're expecting?
- If you don't know what the other person is expecting – whether it's a client, a co-worker, a vendor, or even your spouse – you're simply “rolling the dice,” hoping that what you do meets their expectations. Rather than take this risk, it's critical to discuss the expectations upfront.
- When it comes to misunderstanding expectations, one of the biggest culprits is the use of vague language. Notice how phrases like “soon, ASAP, when you have a moment, it shouldn't be much longer now” all leave too much room for interpretation. Your definition of “soon” might be much different than someone else's definition, and you're going to be judged by what's in their mind, not yours.
- Virtually every misunderstanding has at its core a miscommunication about expectations. One person expected something different than the other person did, and that's why we're angry or frustrated. This can largely be avoided if we get clear from the beginning.
- It's important to set *and* ask for expectations. “I'll have this by tomorrow. Does that work for you?” or “By when do you need this?”
- It's been said that “when you want to influence action, what counts is what's heard, not what you said.” You may think you've been clear, but unless you check with the other person to find out what they heard, or what their understanding is, you may still have a disconnect about the expectations.
- Sometimes we don't ask a client or our boss for their expectations because we're afraid they might be unrealistic. But here's the problem: they still have those expectations! It's better to get them out in the open so that you at least have a chance to discuss them or reset them, rather than unknowingly being held to impossible expectations.

- This Fundamental is closely related to the notion of honoring commitments. Honoring commitments begins with having a crystal clear understanding and agreement about the expectations.
- If your boss or a client asks you for something and you're unclear on what they expect, it's your responsibility to ask for more clarity. And if they answer but you're still unclear, it's your responsibility to ask again! While it would be great if everyone always gave you clear expectations, you don't get to be a victim. It's your job to ask until you're clear.
- Sometimes it can feel like it slows things down to have to be crystal clear about expectations and confirm that others are on the same page; but it ultimately speeds things up by avoiding the wasted time, energy, and frustration that usually accompany misunderstandings about expectations.
- Getting clear on expectations can be a big stress-reducer. If we're unclear on the expectations, we often respond to situations as if they're urgent, when in fact, they may not be. If you get clear on the expectations, you can prioritize your work more effectively.
- Sometimes others are reluctant to give us clear expectations because they can't be sure. In these cases, it can be helpful to give them a range so you can narrow the scope, such as: "Do you think this will take a few days, a few weeks, or a few months?" While we may not gain an exact expectation, we'll at least have a reasonable estimation with which to work.
- If you have voicemail, notice how your voicemail greeting either sets no expectation or inadvertently sets an unrealistic expectation about your availability and when you'll be getting back to callers. Consider changing your voicemail greeting daily to set clear expectations for your callers.
- If you have email, consider using an "out of office" message when you're going to be away or are going to have limited access to your email. This is an easy and effective way to set expectations for those trying to reach you.



**eMinder lessons are sent out every Wednesday, with reminders Thursday and Friday if not answered. All Fundamentals have at least 6 lessons.**

### **eMinder Lesson 1**

Your team's finishing up a project and your supervisor asks you to write a report about it when you get a chance. What do you do next?

- a. Assume your supervisor wants a detailed report and plan to write it by the end of the week.
- b. Assume your supervisor's in a hurry for the information and just wants a quick update, and submit the report by day's end.
- c. Ask your supervisor how soon she'd like the report and how detailed she'd like for it to be.
- d. Ask a co-worker what he's learned about the supervisor's expectations and follow his advice about when to submit the report.

Feedback based on chosen response:

- a. You're trying to be thorough, but you really have no idea exactly what your supervisor wants and when. Get clear on her expectations and establish a mutually understood objective by asking her when she'd like to receive the report and how detailed she'd like for it to be.
- b. Responding swiftly to your supervisor is admirable, but she may prefer to wait a few days for a more detailed report. Get clear on her expectations and establish a mutually understood objective by asking her when she'd like to receive the report and how detailed she'd like for it to be.
- c. This is the best response. You're getting clear on your supervisor's expectations by asking her exactly what she needs, enabling the two of you to establish a mutually understood objective.
- d. You're trying to make sure you respond appropriately by getting advice from your co-worker, but he may steer you in the wrong direction. Get clear on your supervisor's expectations and establish a mutually understood objective by asking her when she wants the report and how detailed it should be.

### **eMinder Lesson 2**

You're talking with a customer about an upcoming deliverable. The customer says that they'd like it ASAP. How do you respond?

- a. Agree with the customer but then make this a priority and get it to them within the next day or two. Since they didn't set a due date, you'll probably exceed their expectations by delivering it quickly.
- b. Offer a specific date and ask if that meets their needs. Confirm that you understand what they're expecting by reviewing the details one more time.
- c. Promise to deliver it in two days. Then make sure you do.
- d. Get to it as soon as you can. That's what the customer requested, so other jobs you have can take precedence, if necessary.

Feedback based on chosen response:

- a. Exceeding expectations is a great way to build customer loyalty and appreciation. However, when we don't know what the customer really expects (since we didn't check-in to confirm that), we're assuming we'll exceed their expectations when in reality, we may not. Sure this up—set deadlines and commitments together. Review the details to be certain everyone is agreeing to the same things. Then, if you can deliver faster, do it and blow away our customer's expectations.
- b. This is the best answer. Working with specific details and expectations means that you understand what our customer needs and you know how to meet those needs. This is the recipe for building long-term relationships and “wow-ing” our customer.
- c. Making promises to deliver is important, however if we don't know that our promise meets our customer's needs, then the promise may not be valued. Collaborate with the customer—set deadlines and commitments together. Review the details to be certain everyone is agreeing to the same things. Then, if you can deliver faster, do it and blow away our customer's expectations.
- d. “ASAP” is one of the most dangerous agreements we can make because what we think ASAP means and what it means to our customer are almost always different. And that is setting us up for failure. Sure this up—set deadlines and commitments together. Review the details to be certain everyone is agreeing to the same things. Then, if you can deliver faster, do it and blow away our customer's expectations.

### eMinder Lesson 3:

You're in a meeting and your supervisor assigns leaders for different phases of a new project. You're put in charge of part of it, but are concerned because he isn't specific about your responsibilities. What do you do?

- a. Thank your supervisor for the opportunity and plan to learn as you go along. You don't want to appear unsure of yourself.
- b. Thank your supervisor for the opportunity, and ask him to meet with you later to go over the specifics about your part in the project, including your role, the expected deliverables, and the expected due dates for each deliverable.
- c. Tell your supervisor that you aren't comfortable undertaking this leadership role.
- d. After the meeting, ask your coworkers what they think your supervisor expects from you.

Feedback based on chosen response:

- a. You're trying to look confident, but your strategy could backfire if you proceed in the wrong direction and don't perform the task the way your supervisor intended. Get clear on his expectations by making an appointment with him to discuss your specific responsibilities and a timeline in which they should be completed.
- b. This is the best answer. You're letting your supervisor know you're already thinking about doing a great job with this task by getting clear on his expectations. Meeting with him will give you the opportunity to ask detailed questions about your responsibilities and a timeline in which they should be completed.
- c. Your supervisor has chosen you for a leadership role--don't miss out on a great opportunity because you aren't clear on his expectations! Thank him for the assignment, and ask to meet with him to go over your responsibilities in detail and the timeframe in which he'd like them completed.
- d. You may think you can get the job done by surveying your coworkers, but they may be just as much in the dark as you are and give you bad advice. Get clear on your supervisor's expectations by making an appointment to meet with him so you can ask specific questions about your responsibilities and a timeline in which they should be completed.

#### eMinder Lesson 4:

You're working on a project for a client that must be completed by the end of the month and you need information from a coworker from another department in order to meet that deadline. What is your approach when you ask for the information?

- a. Call the coworker and ask for the necessary information; be sure to mention that you need to have the project ready for the client to review at the end of the month.
- b. Email your coworker to ask for her assistance, then list the specific information you need and when you will need for her to provide it in order for you to meet the deadline.
- c. Send your coworker an email to let her know you're working on the project, and ask her to send information on the topic by a specific date.
- d. Catch the coworker in the break room, tell her you're on a deadline to finish this project, and ask her to send the information you need soon.

Feedback based on chosen response:

- a. You told your coworker when the client is expecting the project, but you didn't make it clear when you need the information in order to meet this deadline. And while it's fine to start the conversation with a phone call, you should also spell out what you need in writing to avoid any confusion. Get clear on expectations and email your request to your coworker, including the date by which you need the information.

- b. This is the best answer. You understand that being as specific as possible when asking for this information is the best way to successfully collaborate with your coworker. By making sure she is clear on your expectations, you eliminate any guesswork on her part, allowing you both to work more effectively and with less stress.
- c. Your coworker is likely to misunderstand any urgency for this project if you just casually ask for the information, and “soon” could mean something completely different to her than it does to you. Make sure she’s clear on your expectations by putting your request in an email that spells out the information you need and when you need it in order to meet your deadline.
- d. It’s a good idea to put your request in writing and you made your time frame clear, but you’re being vague about exactly what information you need for this client. Your coworker may send too little or too much information, which is likely to trigger a volley of emails that will frustrate both of you. Respect your coworker’s time and effort by making your expectations clear. Provide a specific list of the information you need.



**The “Coaching Guide” consists of teaching points, coaching tips, and questions for discussion.**

### Teaching Points:

- We judge situations not by what happened, but rather by how they compared to what we *expected* to happen.
- If you don’t know what the other person is expecting, you’re just “rolling the dice” and hoping you meet the expectation.
- It’s important to set *and* ask for expectations. “I’ll have this to you by tomorrow. Does that work for you?” or “When do you need this by?”
- It’s critical in every conversation to be clear about exactly what’s expected. This is true in all our communications, internally and externally.
- Virtually every misunderstanding has at its core a miscommunication about expectations. One person expected something different than the other person did.
- It’s been said that “when you want to influence action, what counts is what’s heard, not what you said.” You may think you’ve been clear, but unless you check with the other person to find out what they heard, or what their understanding is, you may still have a disconnect about the expectations.
- This Fundamental is closely related to the notion of honoring commitments. Honoring commitments begins with having a crystal clear understanding and agreement about expectations.
- A big part of delivering legendary service is to do the unexpected. If you’re not clear about just what’s expected, it’s hard to determine what might go beyond those expectations.
- Sometimes it can feel like it slows things down to have to be crystal clear about expectations and confirm that others are on the same page; but it ultimately speeds things up by avoiding the wasted time, energy, and frustration that usually accompany misunderstandings about expectations.

### Coaching Tips:

- When working with employees on this Fundamental, be particularly mindful of our language, as a big cause for misunderstanding about expectations is the sloppiness of our language. Vague statements such as, “when you get a chance” or “as soon as you can” or “it shouldn’t take long” all lead to confusion because they can mean very different things to different people. Set the example by being clear and specific in your language and teach your people to do the same.
- Watch out for places where expectations may be set by one person but not communicated to others in your organization. Consider having a place in your customer documentation for expectations to be spelled out clearly for all to see.



### Questions for Discussion:

- How do you think “sloppiness” around our language can contribute to misunderstandings about expectations?
- Can you name at least 6 phrases we often use that are vague and that contribute to these misunderstandings?
- How does this Fundamental relate to honoring commitments?
- What role does your voicemail greeting play in setting expectations?
- What do we mean when we say that “people judge us not by what happened, but rather by how it compared to what they expected to happen”?
- Why is it important both to “set” and “ask for” expectations?
- Can you think of a situation where a misunderstanding occurred because you had a different expectation than someone else? What happened and how might this have been avoided by using this Fundamental?
- What should you do if you fear that a customer, or even a co-worker, might have unrealistic expectations?
- How might this Fundamental be used to create clarity around action items coming out of a meeting?
- How might you seek more clarity about expectations, without coming across as being pushy or obnoxious?
- How can you use your out-of-office email to set appropriate expectations?



**Fundamental Minute Videos** (each Fundamental has between 2 and 7 video tutorials):



Click on hyperlinks to see video samples

<https://youtu.be/ieyAjXDYyz4>

<https://youtu.be/ywa-OpJELAE>

[https://youtu.be/h0MPCK02b\\_A](https://youtu.be/h0MPCK02b_A)

<https://youtu.be/KMB3w0p024g>

<https://youtu.be/CMrSXNLNN60>

<https://youtu.be/KltZNkPYuy0>



eLearning

GET CLEAR ON EXPECTATIONS.

# EXPECTATIONS

Create clarity and avoid misunderstandings by discussing expectations upfront. Establish mutually understood objectives and deadlines for all projects, issues, and commitments. Where appropriate, confirm your communication by asking others to repeat back their understanding to ensure total clarity and agreement.

? Question

Which of the following are examples of setting clear expectations?

(You can choose more than one answer)

- ☐ "That part usually doesn't take very long to arrive."
- ☐ "I'll get back to you by Tuesday morning at 10:00."
- ☐ "I'll need that revised estimate back by the end of the business day on Thursday."
- ☐ "When you have an opportunity, can you get me a copy of those meeting notes?"

Submit

careful in our conversations – with customers, with  
everyone has the exact same expectations. To do

Here are some examples of setting clear expectations:

- "The shipment is going out on Thursday."
- "I need that report by the end of the day Tuesday."
- "I'll get back to you with an update by tomorrow morning at 9:00."

It's equally important to ask for expectations when we're not clear. For example:

- "By when do you need this?"
- "When will you be getting back to me?"
- "How long should I allow for this meeting?"

While it may seem like an unnecessary or extra step, it's often helpful to repeat back what you understand the expectation to be so that everyone is absolutely clear. Almost every misunderstanding, at work and at home, is rooted in confusion around expectations. That's why this is such an important Fundamental for us.



What's wrong with all of these statements/questions? You guessed it. They're vague and unclear and leave open the possibility that different people could come away with very different expectations. One person might interpret "it shouldn't be much longer" to mean 2 days while another thinks it means 2 weeks. And here's the real issue: we judge situations not by what happens, but by how it compared to what we *expected* to happen.

If the shipment arrives in 4 days, but you were expecting it in 2 weeks, you'll be thrilled. But if you were expecting it in 2 days, you're going to be pretty upset. It's not the 4 days that matters, but how it compared to what you were expecting!



#### Learning content

You're talking with a customer about an upcoming deliverable. The customer says that they'd like it ASAP. How do you respond?

#### Question

Apply your learning to the scenario described above.

- ☐ Agree with the customer but then make this a priority and get it to them within the next day or two. Since they didn't set a due date, you'll probably exceed their expectations by delivering it quickly.
- ☐ Offer a specific date and ask if that meets their needs. Confirm that you understand what they're expecting by reviewing the details one more time.
- ☐ Promise to deliver it in two days. Then make sure you do.
- ☐ Get to it as soon as you can. That's what the customer requested, so other jobs you have can take precedence, if necessary.

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