

Conversation Plan – Setting Clear Expectations

Prepare notes under these headings prior to the meeting. Use your own natural language style. Use job descriptions, typical standards or KPIs, professional standards etc. that detail what is expected to help you be accurate and precise. Find a quiet place where you won’t be interrupted.

1. The purpose of this meeting is to agree/clarify what’s expected of you in relation to: [e.g. identify the job responsibility, expected professional standard, client deliverable, NPDC principle, quality standard or behavioral issue you’ve observed in relation to which you want to set expectations.]
2. “It is important we agree these expectations because: [Explain why it’s important the standard is achieved and consequences of non-delivery in terms of individual and overall business success]
3. “The results/standards I expect from you are …… [Expectations should be S.M.A.R.T i.e. Specific, Measurable, Attainable, Relevant and Time bound]
4. “Are you clear about our expectations? [Perhaps ask them to repeat them back to you]
5. “What issues do you foresee in delivery i.e. what help, tools, materials, time etc. do you need? [Discuss, agree and record issues to be managed and support to be provided]
6. Do you understand what is expected of you? [Summarise again if useful]
7. Let’s agree how we’ll track progress together: [Record when and how you will check progress together, set dates if useful]
8. “Can you commit to delivery? [Explain the ‘No Surprises rule’ i.e. the moment an expectation/deliverable is in jeopardy it is their responsibility to raise the issue with you so there are ‘No Surprises’]

Thank you.