



## TRANSCRIPT

Episode # 33: A Powerful Checklist For Setting Clear Expectations.

You are listening to Episode 33 of *Mastering The Power Skills*. Think about it, your entire life as a leader and manager is spent asking people to get things done. Yet few of us were ever taught how to do this in a way that increases the odds that you'll get the results that you want.

Here's the good news, however, there's actually a checklist that you can follow that makes you an expert at asking people to do things. Join us in this episode and I'll not only walk you through that checklist, I'll provide you with a downloadable copy that you can use over and over again.

How much more could you accomplish if you were 25% or even 50% more influential and persuasive? Welcome to *Mastering The Power Skills*, the podcast that provides you with the tips, strategies, and the inspiration to grow your own

power and win support for your ideas. And now here's your host, C-suite leadership coach Kathy Dockry.

Well, hello everyone. In our last episode I told you about the magic formula for getting other people to do things. It's this, clear expectations plus firm accountability equals better results with less friction. Now, that's an outcome I think we all would like to see. The beauty of this magic formula to you is that if you follow it regularly, you're going to see a great improvement in your work life as a leader.

The things that you ask get done, will be getting done faster and more smoothly. And you won't feel like you have to exert a lot of effort to drag people along with you. A few months into using this formula, you'll wake up one morning and realize that things are humming along with a life of their own. And you will have more time to focus on the important stuff, versus wondering if people are completing their tasks well.

Now, this doesn't mean that there won't be unanticipated problems from time to time or that you'll occasionally have someone on your team who isn't performing well. But by using the magic formula regularly, you greatly reduce the occurrence of avoidable problems. And you'll also more quickly spot and solve any of the problems you do have with the weaker members of your team.

I always like to think of it this way, how much better would things be for you if things were going 50% more smoothly? That would be pretty good, right? If I had a simple formula for doing that, I sure would be following it religiously. And in fact, I have done that and it took my work life to a whole new level because I had teams that were producing better results, and doing that smoothly and efficiently.

If you haven't yet listened to last week's episode, which is episode 32, I definitely recommend it because it's going to give you more insight on the magic formula. And in this week's episode, I'm going to give you more details on a particular part of that formula.

We're going to be talking about how to set crystal clear expectations. I'm going to walk you through how to do that and I'm going to provide you with a powerful five-point downloadable checklist so that you can easily become an expert at doing this. You're going to find some tips in this checklist, by the way, that you've likely never heard of before. And let me tell you, they actually work like a charm. Okay, so let's get going.

Normally, we think of the pivotal part of asking someone to do something as "the conversation." You know what I mean, right? It's where we call a member of our team into our office or ask them to join us on a video call, and then ask them to

do the task or project we want them to do. Or it's where we are asking a peer to do something. We set up a time to talk about that.

Sometimes we might even skip the face to face and ask for what we want via email. But again, we could look at that as "the conversation," right, just in written form. What we're doing is we connect with the person, we ask for what we want, and we answer any questions they may have.

"The conversation," and I'm putting air quotes around that, is where we really get into it. But what we don't often do is to take 5 to 10 minutes ahead of time to prepare for the conversation. And after all, why would we? We already know what we want, let's just get into the conversation and talk it out. That's kind of what we do, right?

But this is where things can go haywire. We never make a commitment at any stage along the way to thinking about clarity. We're just operating from this assumption that we're always clear, no matter what. Unconsciously, or maybe not so unconsciously, we're assuming that if other people don't understand us, that's their problem. They're just confused, or perhaps even a little slow. It's their job to ask questions and to figure things out.

Except that assumption, that gaining clarity is their problem, is clearly not true, right, when we actually talk about it. Because it's our problem if things don't get done right. It's our performance and reputation that suffers. We are held accountable for the ball getting dropped, as well as all those other people. So we need to invest a little time before the conversation to prepare for it.

I once had a client who was a rocket ship, as I bet many of you are. His capacity to think and to move quickly was truly amazing. And his team struggled to keep up with him. That wasn't because they weren't talented. It was because he hadn't always spelled out, with sufficient clarity, where he was headed and what exactly he wanted from them.

Needless to say, when I talked to him about this, he was resistant to this idea of preparing ahead of time whenever he needed to ask them to do something. Even 5 to 10 minutes of prep felt like it would weigh him down like a heavy anchor. And that as a result, he wouldn't be able to get as much done as he would when he was in rocket ship mode.

But nonetheless, he reluctantly agreed to experiment with preparing for these conversations because I pointed out to him he was already wasting time. Because his time was being sucked up after the conversation by having to continually swoop down and course correct his team when they started heading in a

direction that he hadn't intended them to do. And my client had to acknowledge that was true. He was seeing that all the time.

So he started to regularly prepare for these conversations by using the checklists that we're going to discuss today. And you know what? He was absolutely delighted because things overall started to go faster, and even easier, rather than slower. And as he reflected to me a few months down the road, he said, "You know, Kathy, I finally figured out that for everyone else to go faster, I had to go a little slower."

So why don't I walk you through the five-point preparation checklist now? And just relax and listen. There's no need to take detailed notes. You can download the PDF copy of the checklist for your own use over and over again. It comes with complete instructions, examples, and lots of space where you can write notes to yourself.

And not only that, we've also included an outline of a script that you can use for after you've prepared for the conversation. It's a script that you're going to use to guide you through the conversation. Just check the link that we've included in the show notes for this episode, and you'll be able to have a copy of that for yourself.

Okay, so let's start with the first thing on your checklist. That thing is to ask yourself, what outcome am I trying to achieve here? In other words, what's the big picture context for your request? What will the beneficial result be to the organization or to your mission if the person accomplishes what you want them to do?

For example, how will work life be better or easier? What strategic goals will this task or project help further? As you jot down your thoughts in the notes section of the PDF we're giving you, try to be conscious of the entire context for the request you're about to make. The more the other person knows that context, the less likely they are to become misaligned with you as they perform the task or the project. They'll have the interior knowledge of where you want them to head and why.

The second thing on your checklist is probably going to be pretty easy for you. It's to identify some of the specific actions you want the other person to take. I'm assuming this will be easy because you probably have been thinking about these already.

Why bother to list these on your checklist if they're so easy to identify? Well, better safe than sorry, right? The act of writing things down often jogs your

memory as to additional actions you might want that person to take. So it's a way of making sure you're being as complete as possible.

And just as an aside, here, if you're kicking off a big project, you often don't have clarity on all the actions you want the person to take, right? To some extent, you'll be relying on them to identify those actions. That's okay, of course.

What you want to do in that situation as you put your checklist together, is just identify a few initial actions. And then, when you have your conversation, you want to ask the person to schedule regular reviews with you to assess progress and to determine the next set of actions.

And now we come to step three in your preparation checklist. Step three is possibly the most important step of all. And why is that? Because this is the step that most of us either skip completely or don't spend enough time on. Not investing in this step, step number three, is likely the primary reason why your team may not be moving as quickly and smoothly as they otherwise could be doing.

So if you choose to do only one or two things on this checklist, and I'm telling you, you probably should do all of them. But if you're only going to do one or



two, be sure to do step number three. The question that you need to answer in step number three is this one, what are my conditions of satisfaction?

Now, don't be thrown off by that phrase, because conditions of satisfaction is really just a formal technical way, it comes from linguistics, of describing how you want the person to perform the task or project. Conditions of satisfaction are the things that come to mind when you're thinking to yourself, "What might go wrong that I need to clarify?"

Another way of looking at this is to imagine what if this person technically does everything I'm asking them to do, but the result is awful? The task or the project is finished, but somehow it's not successful and maybe it's even worthless. If that were true, what would they have gotten wrong? Or what would they have missed? Because you want to warn them about those things now, versus when things are going wrong.

So all of this is a little theoretical, I know. So let me give you some common examples of things that involve the how of doing a project or a task. These are the things that often need to be spelled out in your initial conversation. And you need to be listing them as you prepare for that conversation. So, let's go through the examples.

Common one, timeframe. We all know that one, right? But do you always give the person the timeframe in which you want them to be doing something? I don't know about you, but when I'm moving fast sometimes I think the other person should know that. But I forget to actually spell it out.

Another example is what priority does this request have versus other projects? Sometimes trade-offs need to be made. The person you're asking to do something, clearly has a lot of other things on their plate. So what takes a backseat? And what takes priority? You need to spell that out.

Here's another example, method of performing. How do you want them to be performing this particular task or project? Think of adjectives and adverbs that describe the desired performance. Is it fast? Do you want them to be performing methodically? Or cautiously? Do you want them to be highly visible? Do you want them to be performing it discreetly?

Another example about the how is behavior and attitude. How do you want that person to be showing up? Do you need that person to be collegial? Do they have to motivate others to be successful in the role? If they do, you want to tell them that. How would the perfect person be behaving and acting in order to do a good job on the thing that you're requesting?

Here is another example, reporting and follow up timeline. Clearly, that's something we're all very familiar with. But it really helps to specify that in the initial conversation versus waiting to discuss it.

Another example is, who needs to be involved or kept in the loop? This is often overlooked, and you want to be thinking about that as you prepare for the conversation. Because you might automatically know this, but the other person might not.

And here's the last example I'm going to give you, but it's a really important one. It's an important one politically as well. What absolutely needs to be avoided? Like offending a key decision maker, or having an adverse impact on a different important project. You want to give the person the red flags. What do they want to avoid? So that they're conscious of that as they're working on the request that you've made of them.

Now, as you can see from these examples, none of the how of doing a task or a project is really that unusual. We're all familiar with these factors. You were probably nodding your head as you heard all these examples, but how often are you taking the time to spell all of this out when you have that initial conversation where you ask someone to do something?

We're all guilty of overlooking a lot of this when we're moving fast. In fact, I recently used a contractor on a technical project for my business. And that project got all messed up. And why? Well, I could point at the contractor and some of the mistakes that the contractor made. But really, as I look at it and I troubleshoot it afterwards, one of the big factors was I didn't roll up my sleeves and get very specific on the conditions of satisfaction.

I just assumed, well, of course, anyone who does a project like this would already know the details of how they should be performing it. Getting very specific felt like overkill, or even a little condescending. And the contractor believed she knew what she was doing.

So what happened? Well, she didn't ask me any questions along the way. She just kept on doing it the way she assumed it should be done. And the result, I got a finished product that was so wrong in so many ways. Luckily, the mess wasn't visible to any of my clients and we extended the due date for the project so we could troubleshoot all the issues.

That was an unnecessary waste of time and effort. Not to mention the emotional aggravation that could have been avoided or minimized if I had taken more time to get specific and comprehensive in articulating the conditions of satisfaction in that very first conversation.

So let's move on now to the fourth question on the checklist. That question is what might motivate the other person to perform the actions that I'm requesting? Too often, we believe that other people are motivated to do things for exactly the same reasons that we are. We do things like we point out to them the benefit to the company, and we assume that will motivate them. Or we figure we're the boss, so of course they'll want to please and obey us.

But really, guys, when you stop to think about it, you just know that isn't true. You've seen plenty of unmotivated colleagues, and you've also seen the results of work being done by unmotivated people. It often takes longer and it's not done as well. Unmotivated, people tend to be less productive people.

So if you want the person you're going to be talking to to be productive, you better think of what is likely to motivate them, and use that when you're communicating your expectations to them.

So let's talk about that a little bit more. Very simply put, if you want to motivate someone, you need to be able to identify a future gain. Often the first gain we think about is a gain to the organization. And that's not bad, but remember, it might not be as compelling to someone else as it is to you. The most persuasive gain that will motivate another person is a gain to them personally.

So, for example, you might point out to them how a successful project could position them well in their career, either within the company or elsewhere. Or you might say that doing a particular task will eliminate a workplace problem that's been bothering them. Or you can simply point out to them that successfully completing the task or the project will give them an opportunity to be publicly seen in a positive light.

So I'll sometimes say, "Getting this done will make you look like a hero." And I chuckle as I say that, but of course, that's true. Doing a good job and having been given credit for doing a good job does lead to others respecting or appreciating you.

And the point is, why leave it to chance for the person that you're talking to to figure this out on their own? Why not point out to them the personal gain for them to meet your request, so that they're highly motivated as they do it?

Finally, the fifth and last question on your preparation checklist might be one you've never thought about before. And that question is, what promises am I willing to make to this person?

So why on earth should we be thinking about making promises? That's because whenever we make a promise, the other person often feels, at a very deep level, that they owe us. How deeply they feel that sense of owing us depends on their personality and the type of promise that you make. But research on motivation suggests that everyone feels this desire to reciprocate when someone makes them a promise, whether they feel that desire strongly or mildly.

So again, it's pretty simple, why not increase your chances that they will give your task or your project their all by making a promise to them? When I talk to clients about making promises, they often get the concept. But they also can feel stuck about what kind of promise they can make.

And here's the good news, the promise doesn't have to be something big or unusual to be highly effective. Often, it can be something that you would have been doing anyway. Because what you're actually doing in making a promise, is reminding the other person that the workplace is a collegial and reciprocal culture. It thrives on people looking out for each other.

And when you make that promise, you're saying, you're implying at least, that you're willing to do your part in looking out for them whenever you ask them to do something for you.

So here are some examples of promises that you can make that will jumpstart your own thinking. Here's an easy one, I promise to give you the support and resources you need to do a good job on this task or project. Or another easy one is, I promise that I'll give you credit with decision makers for all your good work on this task or project.

Here's an often unused, but very powerful, promise to make. I promise to be open to different ways of doing this project if you feel that's necessary at some point. Again, hopefully you would have done that anyway. But by spelling that out to the person up front, you're helping them to understand that you're committed to fulfilling your part of the workplace relationship.

And finally, you can promise to fulfill a different goal that the other person might have. By that I mean a goal that's different from the request that you're making. This is a time honored you scratch my back and I'll scratch yours. Maybe they need help on another project. Or they need approval of a new hire. Or they need help with getting a promotion. You name it, there are a gazillion things that the other person could need.

Making this sort of promise, you know, you scratch my back and I'll scratch yours, is very useful when you're asking a peer to do something versus a member of your team. When you need help from a colleague, they can often expect and



appreciate something valuable in return, because otherwise they begin to feel used and taken advantage of.

So, okay, If that's your overview of your preparation checklist. Here's how you should be using it, over the next few months you should be pulling it out before you make any significant request to your team or to your colleagues. Spend 10 minutes answering the five questions.

Then, now that you have the information you need for the conversation, prepare your script for that conversation. And you know what? The downloadable PDF that we've created for you, gives you the template to do that easily and quickly. It walks you through exactly what you need to say, and the order in which you need to say it. Easy peasy.

Notice that I said you should do this for the next few months. I'm not suggesting that you have to do this for every conversation you have in the workplace for the rest of your career, of course, pulling out this checklist and methodically answering all the questions. You could do that, of course. But at the very least, what you do want to do is to practice this regularly so you build the habit of being able to set clear expectations, and it starts coming more naturally to you.

And I also strongly recommend that you pull out this checklist whenever you have to ask someone to do something complicated or critical. If the stakes are high, remove some of that risk by ensuring that you're well prepared for that initial conversation and can set clear expectations.

Finally, speaking of giving people credit, which I did a little earlier in this podcast, I do want to mention that much of what I've discussed today about setting clear expectations is not new. Many other management experts have written and talked about it, and it's even been studied in the field of linguistics.

I especially like a little book that, unfortunately, has long been out of print called *Leadership And The Art Of Conversation*. It's by Kim Krisco, that's spelled K-R-I-S-C-O. And if you ever get your hands on a copy, it's filled with all sorts of cool little tidbits to help you as a leader.

Occasionally, for some reason, it's still in print in India. So in the world of global markets you may be able to track it down. And you can probably find a used copy here in the States. But let me warn you, because it's out of print you're probably going to spend a lot of money to get a used copy here in the States.

So the whole point of mentioning these experts and what they've written on stuff is, clearly, I can't claim credit for the entirety of this concept around setting clear expectations. My only contribution here has been to add a few more persuasive tips from my grab bag of persuasion tips, and to create some checklists and templates that make it easier for you and my clients to get good at this skill.

So, again, be sure to go to our show notes for this episode of the podcast to get the link to download both the preparation checklist and the template for your conversations. I promise you that you'll be glad that you did because you're going to begin to see how much faster and more successful your team becomes.

Okay, my friends, we've finished the second part of our three part series on the magic formula, how to set clear expectations. I hope that was helpful for you because in our next episode, we'll be moving on and we'll finish the series by talking about another aspect of the formula, and that's how to create firm accountability.

Accountability, ooh, that's such an important and often seemingly challenging topic. I hear about it all the time in the companies where I coach. But here's the good news, while sometimes it can feel hard to change the culture of a workplace where accountability isn't always a top value, it's actually pretty simple for you, personally, to do a few things to make accountability more likely.

Like a lot of aspects of management, creating interesting and easy new habits can have a big payoff for you. So I'm looking forward to sharing with you next time how to increase accountability easily and gracefully and in a way that doesn't feel heavy handed at all. In the meantime, though, I hope you're heading into an awesome week ahead, and I'm looking forward to seeing you in our next episode.

Hey there, would you like some personal guidance about how to use the power skills of influence, persuasion, or presence in a particular situation in your workplace? Well, if so, we've got your back. Just send us a note explaining your situation to [powerskills@significagroup.com](mailto:powerskills@significagroup.com). We'll drop that email address in the show notes. We'll feature your inquiry in an upcoming episode, keeping your identity anonymous, of course, and make sure you have some tips and strategies to help you navigate your particular situation skillfully.

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