

# clear expectations

*to communicate simply what is reasonable, due, or necessary*

Whether asking an aide to work a case, a patient or insurer to pay a bill, speaking with a patient or communicating across the team, communicating clear expectations is critical.

Everybody knows the importance of communication. Whether it be with family, friends, coworkers or customers, proper communication is what helps us understand and connect with others. Clear expectations lead to seamless communication and will help overcome barriers if problems and challenges arise.

If you do not set the proper expectations with your client, colleague or partner, then you run the risk of leaving a bad taste in their mouth about your company as they will feel they cannot trust your word or the company's. You do not want to be the company that has negative reviews on your services or your team over something as simple as not getting a report out on time or not making a phone call.

There have been many times I have met with prospective clients that are unhappy with their current providers because they simply did not get a report on time from them or their current providers did not call them back when they said they would. It may seem small, but to a partner or a client, it is a big deal. They expect you to follow through with your commitment. They want their time respected and valued, hence why setting the expectation and following through is so important.

## HOW TO SET CLEAR EXPECTATIONS:

**Give an overview of the task you need completed** Simply state the task and don't be ambiguous when it comes to what you're asking of people: make things clear from the outset.

**Specifically state the goal & timeline** In one sentence, describe the ultimate goal you expect the person to accomplish by doing this task.

**Describe how the task relates to the goal** Reiterate both the task to be done and the goal by explaining how they are related. For example, an aide that completes a case with a patient successfully will be offered more work.

**List known constraints and business requirements** Outline any known constraints that should be considered in the course of this work. For example, if a task can only be completed during certain days or hours, indicate these restrictions.

**List available resources to help complete the work** This may be the use of Google Maps or Waze for an aide, a payroll app or payment tools for a client.

**Ask for questions** Explicitly ask the person you're requesting the task from for questions before finishing the discussion.

**Confirm their understanding of the work** It's good practice when assigning bigger tasks or projects to encourage people to write down what's expected of them with a breakdown of steps or actions needed in order to achieve the goal.

**Confirm their acceptance of the work** While no one likes repeating things to confirm their understanding, it is a beneficial exercise that ensures you both know what is needed and what is expected.

When you follow the steps above to set clear expectations, your interactions will be more likely to achieve results. Further, if they encounter difficulty during these tasks—they will be more likely to keep you informed.



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