

Establishing Expectations

How Can we Work Best Together?

Manager's' Name _____

Date _____

Expectations	Yes No	Notes to Expectations
Face to Face communication 1. Can we agree to meet weekly? 2. Can I freely reschedule when our meetings are overridden? 3. Can I go first? 4. Our meeting will routinely cover: a. Upcoming travel b. Calendar c. Meeting conflicts (which can I reschedule) d. Review of your current projects e. Review of my current projects	1. <input type="checkbox"/> <input type="checkbox"/> 2. <input type="checkbox"/> <input type="checkbox"/> 3. <input type="checkbox"/> <input type="checkbox"/> 4. <input type="checkbox"/> <input type="checkbox"/> a. <input type="checkbox"/> <input type="checkbox"/> b. <input type="checkbox"/> <input type="checkbox"/> c. <input type="checkbox"/> <input type="checkbox"/> d. <input type="checkbox"/> <input type="checkbox"/> e. <input type="checkbox"/> <input type="checkbox"/>	
How do you want to be prepared for the day 5. Print Outlook Calendar. 6. Use color coding for appointments. 7. Use color coded files by action or importance. 8. Use Monday – Friday files.	5. <input type="checkbox"/> <input type="checkbox"/> 6. <input type="checkbox"/> <input type="checkbox"/> 7. <input type="checkbox"/> <input type="checkbox"/> 8. <input type="checkbox"/> <input type="checkbox"/>	
Task delegation and follow up 9. Use Outlook "Assign Task" feature. 10. Use Email with subject line defining due date and prioritization 11. When you come into my work space you will allow me to fully switch my attention so that I can completely capture your request. 12. When leaving a task request by phone, the importance and due date will be included. 13. Do you want me to report back when tasks are completed? 14. Or, do you want to assume that a task is complete unless you hear from me?	9. <input type="checkbox"/> <input type="checkbox"/> 10. <input type="checkbox"/> <input type="checkbox"/> 11. <input type="checkbox"/> <input type="checkbox"/> 12. <input type="checkbox"/> <input type="checkbox"/> 13. <input type="checkbox"/> <input type="checkbox"/> 14. <input type="checkbox"/> <input type="checkbox"/>	
Meeting management 15. You will utilize the Standing Meeting Request Form. 16. I will utilize the Standard Meeting Request Form. 17. I will insert the agenda and supporting documents into a meeting appointment. 18. I will maintain files in preparation for upcoming meetings.	15. <input type="checkbox"/> <input type="checkbox"/> 16. <input type="checkbox"/> <input type="checkbox"/> 17. <input type="checkbox"/> <input type="checkbox"/> 18. <input type="checkbox"/> <input type="checkbox"/>	
Travel management 19. Travel Package will include: a. Receipt envelope b. Full itinerary with confirmation numbers c. Driving directions and drive time d. Contact addresses, business phone and cell numbers e. Itinerary for family 20. The best way for me to reach you when you are on the road is	19 a. <input type="checkbox"/> <input type="checkbox"/> b. <input type="checkbox"/> <input type="checkbox"/> c. <input type="checkbox"/> <input type="checkbox"/> d. <input type="checkbox"/> <input type="checkbox"/> e. <input type="checkbox"/> <input type="checkbox"/> 20 <input type="checkbox"/> cell <input type="checkbox"/> email <input type="checkbox"/> text	
Priority management 21. As a rule, you can assume that I will be working on assignments on a first-in / first-out basis. 22. True emergencies will be the exception to that. 23. We will make every effort to identify true emergency by:	21. <input type="checkbox"/> <input type="checkbox"/> 22. <input type="checkbox"/> <input type="checkbox"/>	