

# Guide for Team Lead

## Intro

**Key output:** you have discussed the progress with your direct report and came to a more or less common understanding of what results, changes or actions the employee is aiming for this year OR have confirmed that no major changes are needed and the person is just expected to continue doing what and how they were doing before. The employee has got a better understanding of where to focus the efforts, what are the priorities, what kind of efforts and actions are especially important and appreciated.

## Key notes

1. Feel free to adapt **the format** (separate meeting, within regular 1:1, Slack check-in); **frequency; depth of the conversation** for your individual situation with each team member.
  - Format: separate meeting, in the course of regular 1:1, Slack check-in — whatever works
  - Frequency: at least twice a year, but more often if it makes sense for you. The more changing the environment or the more atypical the task is - the more often you need re-syncs.
  - Depth: some talks may be short, others need to be more reflective.
  - Remember, that employees at different stages of professional maturity require different levels of detail while setting expectations.

## 2. Expectations ≠ Always About Growth or Change

Setting expectations doesn't always mean aiming for big growth or transformation. Sometimes, the most important thing is to simply stay on course. If you and the team member are happy with their current performance and just want them to continue in the same direction — that **can** be the expectation.

Still, it's helpful to **clearly reinforce** which aspects of their work are especially valuable and should be preserved. In short, make sure you both share an understanding of what constitutes "good performance" and what would be considered "below expectations."

This clarity helps people stay focused and confident in their work.

### 3. Defining Expectations - is mutual work.

You are not obliged to come up with goals and expectations for your employees, and you don't need to have a perfectly clear answer ready. That's okay. Don't be afraid to say that you don't have an answer ready. An important part of the meeting is to discuss and align together.

### 4. Use **Navigation algorithm** over complex cases in Expectations talks. Sometimes expectation talks go broader than just "how to formulate expectations". Use this navigation algorithm to learn how to navigate common "forks" that you may encounter:

- What if someone wants a promotion for next grade?
- What if there's no further growth space in the team?
- etc.

## Go beyond SMART

when it is not applicable. Hacks and approaches that can be used for defining expectations

### 1. "HOW" approach, define expectations in the form of expected actions and behaviours.

When you can't formulate specific measurable outcomes and can only outline the direction of development or change (e.g., "Manage communication with stakeholders", "Perform execution control" etc.), use the "How" approach: How the person should act. Dive deeper into what specific actions would demonstrate that the person is moving in the right direction. Clarify what behaviors or achievements will be viewed as progress toward this goal.

### 2. Set the baseline.

When the amount or impact of results is undefinable because it depends on external factors, define **qualitative standards**: what should be ensured in each task or activity (e. g. test, event) to "meet expectations"

### 3. Scenarios of the future.

When it is unclear what the goals should be because it is unclear where the team will eventually come — frame the discussion around 2-3 likely scenarios for how the year could unfold for the team. Use these scenarios as a basis for outlining personal expectations for the individual.

4. **Shared responsibility.** When you can't imagine anything that could "exceed expectations", share responsibility, involve the person into defining what can be "Extra", or encourage them to come to you to discuss ideas when they have them. For example:

- If not losing in quality in the main work, they take on additional tasks or come up with ideas during the year that demonstrate value or align with company priorities, it will be considered.
- You can agree on several directions where you would like the team to show progress this year and agree on which areas or how many are expected to be considered as **meeting expectations**. Accordingly, if they manage to achieve something beyond that, it will be recognized as "exceed".

## Step 1 – Plan

Duration: 5-10 min

1	Decide if you need to conduct a 1:1 on expectations now
1	<p>&gt; We strongly suggest making time for the conversation, if:</p> <ul style="list-style-type: none"><li>◆ You have not explicitly asked your team member during the last 6 months how confident they are about what is expected of them and what they need to do to be recognized and rewarded at least at the same level as before? Whether they know that they should push harder, improve in specific areas, or simply continue as before?</li></ul>

♦ **The "game rules" have changed** for the team or for the person. Team priority has changed; you expect from the person more than they were doing before; you need them to take on new roles, show different behavior, etc.

> **The conversation may be brief and doesn't necessarily have to be a call:**

♦ If you know that the person is fine with the current tasks and you need them to just continue doing what they were doing — then the expectations conversation can be brief and doesn't necessarily need to happen in person. However, it's still valuable to reinforce what aspects of their work are most critical and worth preserving. Essentially, ensure alignment on what constitutes "good performance" and what would be considered "below expectations."

> **If you're in doubt** – we recommend you ask the employee: "Is it clear for you where to put effort, what is expected from you? Do you want to sync and talk about it?" The easiest way to reach understanding is to ask.

## Step 2 – Prepare

Duration: 15-20 min

2 . 1	<b>Reflect on Teams' strategic goals or/and OKRs (if any)</b>
	♦ What are the objectives and key results you want to achieve as a team, areas where you want to show progress. What contribution is particularly important from the person?
2 . 2	<b>Sum up the information about the previous period</b>
	♦ Find in advance your previous agreements and plans that you discussed last time: what is the status of each paragraph, what has lost relevance, and what new priorities have emerged during the reviewed period due to external and internal changes.
2 .	<b>Analyze whether you're totally satisfied with how the person is doing their work</b>

- ◊ Does the person match their current grade expectations?
- ◊ Are you satisfied with the amount of work they're doing, efficiency (outcome/time costs), dedication, autonomy, etc.?
- ◊ Recall specific situations (3-5) over the entire reviewed period that you can use as examples when, in your opinion, the person acted as expected, and when you expected different behavior. Be ready to comment on them at the meeting.

Examples:

- In a challenging SITUATION {provide example}, you took on the coordination of the team's efforts and the search for the solution, and it helped {which positive effects it had}.
- Before proposing the idea, you've learnt how competitors approached the same problem and borrow good ideas.
- You've improved the proposed feature discoverability / design.
- In SITUATION {provide example}, you brought up a good solution that helped the team move forward.
- In case of failure {provide an example}, you tend to blame other team members, and it affects negatively general emotional state. Try formulating suggestions instead of accusations.
- While working on {provide example}, you strived to control every step of the team that decreases the motivation and initiative of people.

## Reflect on your decision-making criteria the last year


- ◊ Reflect on what affected your performance perception and evaluation last year? What were the main factors that affected your decision? What aspects did you pay attention to?

The following questions may help you come to insights about your criteria:

- ◊ In comparison to people who got lower marks - what that person managed to do differently?
- ◊ In comparison to people who got higher marks - what those people managed to do


differently, that affected your decision?

- ◊ If carried out now, what performance evaluation will you define for the person?  
Why?

 **Quick hint!** It's very convenient to hold meetings in Bob using 1-on-1 functionality. In the available templates we've created one called **JetBrains sync on expectations**, that already includes all talking points from this guide. You can follow the steps and write notes under each point or in private notes. Due to the current functionality of Bob, only team leads can create 1-on-1, while Team members can see already planned meetings, can add notes and talking points.

## Step 3 – Discuss on the sync

Duration: 45-90 min


3 . 1	<b>Ask for the person's perspective and aspirations</b>
	<ul style="list-style-type: none"><li>◊ Are they fine with ... current tasks, bonuses, grade, promotion speed etc.</li></ul> <p>If not, refer to  <a href="#">Navigation algorithm</a> for suggestions on how to address these "forks" in the talk.</p>
3 . 2	<b>Make a light overview of the progress so far and provide feedback</b>
	<ul style="list-style-type: none"><li>◊ Now share your perspective. Mention the three most impressive accomplishments and three areas for improvement – refer to examples you recalled during Preparation.</li></ul>
3 . 3	<b>Discuss and co-define the level of expectations for the next period</b>
	<ul style="list-style-type: none"><li>◊ Discuss and define with the employee specific criteria, achievements, expectations for them for the next period.</li><li>◊ Use approaches that help you reach a shared vision (Key results, "How" approach,</li></ul>

	scenarios, setting the baseline, sharing responsibility, etc.)
	<ul style="list-style-type: none"> <li>Ask employee to add their own ideas on what they are planning to achieve.</li> </ul>
<b>3</b>	<b>Discuss what kind of support the employee needs</b>
<b>4</b>	<ul style="list-style-type: none"> <li>Ask or think together how the employee is going to correspond to the expectations, what can affect the results, which kind of support they need. For example, they need more frequent feedback, or support from another team.</li> </ul>

## Step 4 – Verify

Duration: 5-10 min

<b>4</b>	<b>Ask the employee to write down the key points of the agreement</b>
<b>1</b>	<ul style="list-style-type: none"> <li>Ask employee to write down the key points of the agreement in a shared space: Goals' section of Bob, Slack Canvas, shared Google document and share it with you.</li> <li>Read and suggest changes or approve if everything matches your vision.</li> </ul> <p><b>Outcome: It has become a bit clearer to you and your direct report where they are expected to focus efforts, what is appreciated.</b></p>

 **Quick Hint:** it is convenient to use Bob's Goals section. It allows you to write down your individual expectations in rather flexible form: with or without key results, with or without description etc. Simultaneously you and your manager will be able to write down comments to each commitment as a history, so during annual feedback it will be easier to recall. Learn [how to add your individual expectations to your Bob profile](#).

*In case of any doubts or difficulties, contact [Anna \(Asya\) Dubko](#) or your Team partner.*