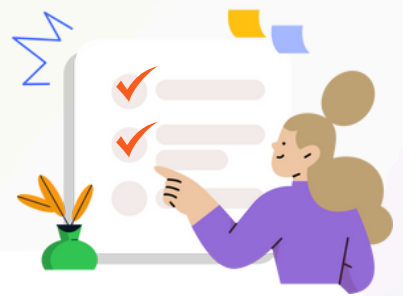# Clarifying Expectations

Clarification Checklist

Jumping into a new project? Hit a roadblock? Here's a list of questions you can use when you need clarification.

✔ What

- What is the task and associated actions?
- What does "done" look like?
- How does success impact the company, team, manager, or client?
- Why is this project important?

✔ How

- Is there documentation or a sample to model off of?
- What programs are necessary to create the deliverable?
- How will I deliver the work product? (document, spreadsheet, etc.)

✔ When

- When should the final project be delivered?
- When does it need to be ready for review and feedback?

✔ Who

- Who are the primary stakeholders for this project?
- Who should be looped in, and at what stage?
- Who am I collaborating with, and how?

Help Checklist

Spinning your wheels and need help? Here are questions you can ask to eliminate work for your manager and team and get back on track.
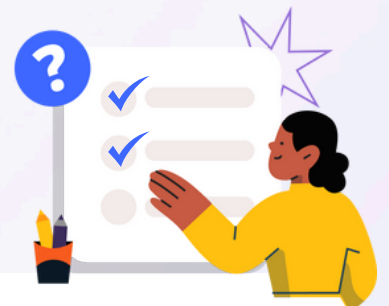
✔ For simple questions, start by:

- Consulting your notes and company documentation
- Researching the question online
- Asking a peer at the same level as you

✔ For project roadblocks:

- Spend 5-10 minutes brainstorming creative solutions - is this something you can solve on your own?
- Consult a peer or mentor
- Alert your manager if the roadblock affects the project's ability to progress - come prepared with an idea of how to solve the issue.

✔ For skill gaps...

If, after research, you feel unsure of how to complete a project at your current skill level:

- Seek a pre-existing sample to use for reference
- Request to shadow your manager or a teammate to observe how they do the task
- Complete the first steps of your project and request that your manager review your early work to confirm if you're on the right track or not.

Clarifying Expectations

Templates: Project Clarification

Seeking Clarification on Project Details

Utilize this template when you need to clarify crucial information like deadline, teammates involved, or delivery expectations.

Subject: **[PROJECT NAME]**

Hi **[MANAGER'S NAME]**,

Thanks for walking me through the **[NAME OF PROJECT]**. After reviewing my notes, I realized there are a few pieces of information I'd like to clarify.

If our client due date is **[X DATE]**, that means my internal due date should probably be **[Y DATE]**. Would you agree?

I can send the final version to you in **[DELIVERY FORMAT]**. Is this the best format for you and the team, or do you prefer a different format?

I'll plan to check-in for feedback after I make progress on the first phase on the project.

Thanks!
[YOUR NAME]

Requesting Help and/or Feedback

Utilize this template when you've encountered a problem that you can't solve via research and resourcefulness. Remember to customize based on your request!

Subject: **[PROJECT NAME]**

Hi **[MANAGER'S NAME]**,

I am checking in with a few questions regarding **[NAME OF PROJECT]**. A quick update on my current progress status: **[RECENT COMPLETIONS & CURRENT STATUS OF PROJECT]**.

As I've moved into this next phase of my project, I have hit a challenge with **[INSERT QUESTION OR CONFUSION]**. To resolve the issue, I've connected with a few other team members and researched solutions via **[INSERT RESEARCH]**. Currently, I believe the best way forward is **[X SOLUTION]**.

Do you have any guidance or resource suggestions? Before I move forward, I want to leverage your expertise and knowledge. If you have availability tomorrow, I'd love to hop on a call to discuss and get your eyers on my current progress

Best!
[YOUR NAME]