Getting Aligned Worksheet

Delegating upwards and setting yourself up for success

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| **I am responsible for:** | [name of project, assignment, etc.] |

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| Step 1: Agree on Expectations with Your Manager | | | | | |
| *We sometimes call this part* ***The 5W’s*** *(what, why, where, when, who). Get clear on your questions or proposals so you can align with your project manager on expectations, resources needed, and project roles.* | | | | | |
| Begin at the end: **What** outcomes are expected? What will success look like? What background and context do you know or need from the project lead or manager about the goals/project? | | | | | |
| **Why** is this task important? Why now? Are there any constraints you should know about? | | | | | |
| **When** does it need to be completed? What are benchmarks along the way? How big of a priority is this relative to other work? | | | | | |
| **Where** can you find resources, examples, or advice? | | | | | |
| **Who** else is involved? The MOCHA for this task is: | **Manager** | **Owner** | **Consulted** | **Helper(s)** | **Approver** |
|  |  |  |  |  |
| What mindsets, values, or behaviors will be important to success? | | | | | |
| How will you seek perspective and adapt to input? | | | | | |
| How will you make sure you and your manager are aligned on **key points and next steps**?   * Verbal repeat-back * Written repeat-back * Other (specify): | | | | | |

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| Step 2: Stay Engaged | | |
| *How frequently will you check in with your manager? How will you ensure you’re on the right track? Break down how you’ll share progress and then confirm that the check-in or review dates work best for each of you (for example, I’ll send the first draft of YYY report by email on October 1 and would love your feedback by end-of-day on October 7). Make your thinking clear so you can adjust dates when needed.* | | |
| **Early Slice** | **Midstream** | **Back End** |
|  |  |  |
| *Date:* | *Date:* | *Date:* |

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| Step 3: Debrief |
| *Create a plan for accountability and learning.* |
| When and how will you [**debrief**](http://www.managementcenter.org/resources/debriefing-template/) how things went? What **questions** will you ask? What **feedback** will you seek or offer about what went well and what could be improved? |