

Tell/Know Checklist

Tell

Many supervisors underestimate the amount of information to be shared & the amount of time it takes

Know

Set Expectations (regarding their Performance & Conduct)

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| 1 | Work responsibilities | <i>What are their overall projects & individual tasks?</i> |
| 2 | Progress | <i>What are the milestones and expected pace towards achieving projects/tasks?</i> |
| 3 | Evaluation | <i>How & when will they be evaluated?</i> |
| 4 | Decision making | <i>How do you want them to make decisions? Which decisions are theirs?</i> |
| 5 | Interpersonal expectations | <ul style="list-style-type: none"> • <i>What are behavioral expectations?</i> • <i>How do you want them to communicate/report news or concerns?</i> • <i>How should they handle conflict?</i> |
| 6 | How things function | <i>Organizational logistics, policies, protocols & point people</i> |
| 7 | Boundaries & limitations | <i>What are they not supposed to do?</i> |

Take a Baseline (of their Knowledge, Skills and Abilities)

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| 1 | Knowledge | <i>What is the depth of their knowledge about the responsibilities you have for them?</i> |
| 2 | Skills | <i>What is the scope and level of their skills?</i> |
| 3 | Previous experience | <i>What is their previous experience with the projects, tasks and responsibilities?</i> |
| 4 | Supervisory experience | <i>How were they previously supervised?</i> |
| 5 | Work style | <i>How do they optimally learn new information, communicate, make decisions, organize themselves, handle conflict and change?</i> |
| 6 | Strengths & growth areas | <i>How accurate is their assessment of their abilities and learning curve?</i> |
| 7 | Concerns | <i>What concerns do they have/barriers do they perceive to their success?</i> |

First week:

1. Set up time (1 hour+) to share a Tell/Know List and tell them you are **both** responsible for making sure these topics are addressed.
2. Provide them with the on-boarding document outlining their job responsibilities/tasks (covering #1 of the Tell list)

Second week:

3. Systematically or organically, make your way through the Tell list. "Are you clear on....?"
4. Set up time to discuss their understanding of the on-boarding document ("Are there additional resources or information you need?") and address the Know list through discussion (verbal or written) and baseline assessment activities, use the Workstyles & Learning Preferences Self Assessment Worksheet.

End of first month:

5. Set up a meeting to review what has been covered, and develop a plan for what is still outstanding.