
CHAPTER 3: MANAGING EXPECTATIONS

Where Trust Is Earned Before the Work Begins

“Set expectations yourself, or others will do it for you.”

As your time management and teamwork skills from the last two chapters continue to prove your capability, others’ expectations for you will begin to increase. This chapter will help you manage those expectations.

Expectations are the assumptions, spoken or unspoken, that others hold about your work, your availability, and your time, and they're not always realistic, or even something they've told you directly. Setting clear expectations, negotiating when necessary, and offering alternatives will keep you productive, reduce unnecessary frustration, and protect your wellbeing over the long run. As your responsibilities grow, setting clear and realistic expectations becomes one of the most important skills you can develop.

This chapter explains how expectations are formed, confirmed, and sustained, along with what to do when they need to change or cannot be met as originally agreed.

PART I: BUILD YOUR PROFESSIONAL FOUNDATION

Expectations are shaped long before a specific request ever arrives. They are shaped by the reliability you have already demonstrated. The elements described here make up your reputation, and mastering each of these components will ensure that you create and maintain a reputation that will work for you rather than hinder you professionally.

YOUR KNOWLEDGE

Many of the people you work with, scientists, program experts, senior leadership, and external partners, are specialists in their own fields, and they expect the same level of expertise and reliability from you in yours.

This starts with mastering your own duties, policies, and procedures well enough to answer questions with confidence. Even when you are sure, it is worth checking against institutional policy or sponsor rules before a response goes out. If you are uncertain, check with a colleague or supervisor. Offering a structured set of options, rather than a flat yes or no, keeps the conversation collaborative and leaves room to adjust as circumstances change.

BENEFIT

A reputation for knowledgeable, verified answers earns you the benefit of the doubt the next time a request is unclear.

YOUR WORD

Delivering on a deadline or a commitment is one of the clearest signals of professionalism you can send, and missing one without warning damages trust faster than almost anything else. Never promise what you cannot deliver, and never give your word lightly; your reputation rides on it. When something genuinely prevents you from delivering on time, the right move is to renegotiate the deadline or the commitment as soon as you know it may be at risk, not to let it pass and explain afterward. The importance of communication will be discussed later in this series, and it is a core component of your professionalism. Communicating proactively highlights your organization and your competence.

BENEFIT

Treating every deadline as a genuine commitment makes your word something people can plan around, and in the event a deadline must change, a history of sticking to your word builds in credibility and goodwill.

YOUR SKILLS

A strong time management system, clear and consistent communication, and an ability to rank and prioritize a series of tasks are the professional skills that will determine the expectations others have of you. If you can master these, you are able to control and manage those expectations in a way that enhances and preserves your reputation.

This trio works best alongside complete mastery of your own duties and a solid grasp of the rules, regulations, and procedures that govern your work. Together, they give you the leverage to understand what people are truly asking for and to calibrate it to your own level. Knowing what is possible, how, and when, and being able to say so clearly, keeps you and a requester on the same page from the first conversation.

BENEFIT

Carrying these skills, and this sense of service, into every request keeps your commitments grounded in reality instead of in optimism.

YOUR COMMUNICATION

Surprising a collaborator, colleague, or supervisor is one of the fastest ways to erode trust. One of the biggest sources of frustration in the workplace is the feeling of being kept in the dark, even when the work itself is excellent. Signal where you are, what is happening now, what is coming next, and when, throughout the work, not just at the end. Keeping people informed reassures them that things are moving, cuts down on the status requests that come from uncertainty, and puts your supervisor in a better position to advocate for you when it matters. Keep in mind that behind every request is someone for whom this may be far more than a task; it may be their life's work, with their career riding on it. Getting it wrong costs more than just a deliverable.

Sometimes communication alone is not enough, and you may need help from a supervisor to push things forward; that is what escalation is for. Escalating a deliverable that is genuinely at risk, expectations that conflict with each other, or a decision that is outside your authority is not a failure on your part. It is a professional call that protects the timeline, the relationship, and the outcome, and using it at the right moment is a sign of discerning judgment, not weakness.

BENEFIT

Regular updates and timely escalation keep small problems from becoming surprises later.

PART II: UNDERSTAND AND CONFIRM WHAT IS BEING ASKED

Once the groundwork is in place, the next step is understanding exactly what a specific request requires, and confirming that you can actually deliver it, before you agree to anything.

DO YOUR DUE DILIGENCE

As outlined in Personal Time Management, due diligence is a key component of your organizational system. The purpose of the due diligence process is to gather all the information and supporting documents needed so you can complete the request as efficiently as possible. By doing this upfront, you reduce the risk of having to stop midway because key information is missing. Failure to conduct due diligence promptly can lead to avoidable delays, inefficiencies, and unnecessary frustration.

When a new request hits your inbox, log it in your queue and immediately assess your familiarity with the task and the requester. During one of your scheduled Non-Core time blocks, review the task and see if you fully understand what is being asked of you. If you understand the request, move on to a priority assessment (discussed in detail in Priority Management) and a thorough consideration of any additional information you will need to complete the task. Respond to the requester with a complete and detailed email that will garner any missing information for you in one fell swoop. Thoughtful engagement here helps ensure a smooth process; try to foresee any potential obstacles or sticking points and address them before they add friction to your work and cause delays.

If you do not understand the request, respond to the requester (during a Non-Core time block) as soon as possible to seek clarification and gather any additional information you will need. Request a phone call so that you can determine the scope, complexity, and urgency of the request. A verbal conversation can help surface nuance that an email thread cannot. Once the phone call is over, send a short summary email confirming your understanding; turn the verbal conversation into a written record. Keep in mind that once expectations are clarified this way, you are responsible for meeting them, and that responsibility only grows when a request crosses into external institutions that may operate under norms or assumptions that differ from your own.

BENEFIT

A few minutes spent studying and confirming a request up front preserves your current work flow and prevents hours of rework for one task based on a misunderstanding.

CONFIRM YOUR REAL CAPACITY

With the request understood, the next step is a careful look at your own workload. Review what is already on your plate and assess, realistically, whether you can complete the new task within the timeframe being asked. This is also the point where silence becomes agreement, so if you have any real concern or constraint, raise it now, not after you have already accepted the work or held onto it too long. Flag it to the requester and your supervisor so alternatives can be explored.

BENEFIT

An honest capacity check before you commit helps you keep your word, and your reputation, intact.

SEPARATE SELF-IMPOSED DEADLINES FROM REQUIRED ONES

Not every deadline is as fixed as it may first appear. Always ask about a deadline to know whether it is unmovable or whether you have some flexibility. Understanding which kind of deadline you are dealing with changes how you should respond to it. Once you have established the type of deadline and agreed on the timeframe, it should be treated as mandatory and met by the assigned due dates.

- **Required or Standing Deadlines:** These are fixed deadlines established by regulatory bodies, contractual obligations, internal policies, or other mandatory requirements. Because these deadlines are not typically flexible, they should be tracked and flagged by your systems well in advance of their due dates. Early notification helps ensure sufficient time for preparation, review, and timely submission.
- **Convenient Deadlines:** These are deadlines established primarily for the requester's preference or schedule rather than due to a regulatory or operational requirement. As a best practice, always confirm the nature of any deadline provided to you. When a deadline has been proposed, and there is a potential conflict on your end, consider discussing it with the requester to determine whether adjustments can be made to better align with your workload and priorities. While convenient deadlines should be respected whenever possible, they should not become an unnecessary source of stress or disrupt the effective management of your other responsibilities.

On rare occasions, it may be possible to seek an extension or revise a deadline from a regulatory body or other authoritative entity. Such requests should only be made when supported by legitimate, unforeseen, and well-documented reasons, such as the absence of a key team member due to a family emergency, a leave of absence, or other extenuating circumstances. Your proven time management system and your history of reliability with your team help you maintain your credibility and the goodwill of those around you when these rare instances happen.

BENEFIT

Distinguishing a preferred deadline from a required one helps you negotiate confidently and maintain a smooth work flow without unnecessarily restructuring your personal tracker.

ASSESS & NEGOTIATE NEW TASKS FROM SUPERVISORS

Your supervisor may assign tasks without notice or consideration of what is already on your plate. Since you cannot refuse these assignments, it is important that you communicate directly and have them help reprioritize, reschedule, and free up space so that you can work on their deliverables. This kind of assessment and discussion is part of your due diligence process. If reprioritizing or rescheduling tasks, ensure that you let the owners of those tasks know of their new deadline and copy your supervisor on this communication. If reprioritizing or rescheduling isn't possible, ask your supervisor to reassign some of your other tasks to a colleague. A new task from your supervisor deserves the same scrutiny as one from anyone else, with one difference: you have a direct line to renegotiate what it displaces. Clarify the scope and relative priority of the new assignment against what is already on your plate, so you can jointly decide what gets postponed or renegotiated.

Being upfront about your constraints and proposing a solution rather than just naming the problem strengthens trust and keeps everyone's expectations grounded in what is actually possible. We will focus more on this specific type of negotiation later in the series with Managing Priorities.

BENEFIT

A quick scope-and-priority conversation with your supervisor keeps one new assignment from derailing everything else, while also demonstrating your professionalism and organization.

PART III: WHEN YOU MUST DECLINE OR REDIRECT

Not every request can be accepted as it stands. This part covers how to respond professionally, by offering a workable alternative instead of a flat refusal. This is also where your time management system can do the talking for you, since a documented queue, a detailed tracker, and a clear calendar make your position easier to explain and harder to argue against. Whenever a request raises a real conflict or dilemma, loop in your supervisor or someone with authority from the very start so they can help shape the solution and, if needed, decline the request on your behalf.

DECLINE BY OFFERING AN ALTERNATIVE

Most support roles are not really in a position to reject a request outright, which makes knowing how to say no without saying it a useful skill. The most effective version of a decline is not a refusal at all. It is an alternative, offered early enough that the requester still has time to adjust.

Whether the issue is competing priorities, unfamiliarity with the request, or legality, raise it as soon as possible after it arrives, and pair the concern with a proposed path forward. Whenever you offer a different approach, bring the supporting documents, policies, or procedures that justify it, and lead with the added value of what you are

proposing rather than the reasons you cannot do what was originally asked. A well-supported alternative reads as expertise, not resistance. Alternatives can include revising a previous submission, offering a different processor, or suggesting another workable path. Your knowledge of your company's procedures, policies, and guidelines will serve you well here by protecting the deliverable while also reducing friction by offering legal and compliant alternatives that can keep work flowing.

BENEFIT

Offering an alternative instead of a refusal, backed by the right documentation, keeps the relationship intact while still protecting your workload.

PROPOSE A DIFFERENT DEADLINE

When a proposed deadline is genuinely too short or conflicts with other prior commitments, review your calendar and come back with one that is workable. Loop in your supervisor before you respond to the requester, so you are proposing a united, supportable position rather than an individual opinion. This gives the requester a clear, realistic option to work with, often prompting them to revise the date or take the request back to their own collaborators. To avoid repeated instances of this type of conflict, remind requesters of your processing deadlines. This is where your personal time management system is essential; your proven success with your system gives credibility to your work and timelines, so you have the ability to stand on them.

BENEFIT

A realistic counter-deadline, reviewed with your supervisor first, is easier for a requester to accept than a simple refusal. You preserve both your productivity and your reputation by proposing dates that are realistic and feasible for your current workload.

PROPOSE A DIFFERENT PROCESSOR

Sometimes the issue is not the deadline but your own availability. If a request lands while you are already at capacity, tell the requester plainly rather than quietly falling behind. As soon as possible, elevate the matter to your supervisor for reassignment. Since you've signaled your unavailability to both the requester and your supervisor, your supervisor can take the matter up with the requester and work with them to reassign the request. Keep in mind that time is of the essence. The sooner you do this, the faster alternative solutions can be found. Your early communication here will serve you well in terms of protecting your reputation and maintaining the expectations that others set for you.

BENEFIT

Redirecting a request to someone with real capacity protects both the deadline and the quality of the work.

SEEK RELIEF ELSEWHERE TO ABSORB NEW TASKS

Sometimes an alternative deadline or a different processor is not enough and only you can handle the matter; the real problem is everything else already on your plate. When you cannot work yourself free of a deliverable through negotiation alone, it is entirely appropriate to ask your supervisor for relief elsewhere.

This can take a few forms: being pulled off routine rotation for a period, having some existing or newly arriving tasks delegated to a colleague, or having a few already-committed priorities rescheduled to make room. Either you or your supervisor should then inform the owners of those reprioritized items directly, so nothing slips without anyone knowing why. Handled this way, the space you need to focus on the deliverable in front of you does not come at the cost of someone else being blindsided.

BENEFIT

Asking for relief before you are overwhelmed demonstrates your time management system at work and protects the deliverable in front of you without leaving anyone else in the dark.

PART IV: SUSTAIN THE RELATIONSHIP OVER TIME

Expectations do not stay fixed once they are set. This part covers what it takes to keep them aligned with reality as work progresses and how to turn each finished deliverable into a lesson for the next one.

ADJUST EXPECTATIONS AS CIRCUMSTANCES CHANGE

As a project evolves, new information surfaces, priorities shift, and timelines move, sometimes for reasons entirely outside your control. Professionals who manage expectations well examine new information for its impact by default, rather than absorbing it passively, and communicate and renegotiate their commitments the moment something changes or looks likely to do so.

When confronted with a new piece of information, assess it in the context of your current task. Does the new information change the owner of the task? Has a regulation or policy change impacted compliance rules? Has the task changed in scope? Have new partners been added? Question the information so that you have a clear understanding of what it does to your work. Treat all work-related news as having the potential to impact your routine, your workload, your industry, etc. In doing so, you will be less likely to overlook potential disruptions. Once you have assessed the new information and determined its impact, communicate clearly with relevant partners and let them know how this new information has changed the timeline, process, or product.

Managing expectations well also means regularly reassessing your own progress, spotting potential risks early, and communicating any adjustment before it becomes urgent. This proactive habit prevents surprises and keeps trust intact because it signals situational awareness rather than reactive scrambling. Adjusting an expectation is not the same as lowering a standard. It keeps the final product aligned with reality, rather than with an assumption that stopped being true weeks ago. Make it a habit to pause on any new piece of information and ask directly: what does this mean for me, and how does it change what I am carrying? This vigilance will help you keep your word, thus maintaining your reputation.

BENEFIT

Communicating a shift before it becomes urgent keeps an adjusted expectation from feeling like a broken promise.

REFLECT AFTER EVERY DELIVERABLE

Once a deliverable is finished, the work is not quite done. A short reflection on what went well, what proved difficult, and how expectations were managed throughout is one of the most underused improvement tools available to you.

Over time, this habit sharpens your instincts. It helps you spot recurring patterns, refine how you communicate, and anticipate what a requester will need before they ask for it.

Reflection is also where you celebrate what went well, not only where you diagnose what went wrong; both halves matter equally.

BENEFIT

A brief post-deliverable reflection turns one project's lessons into the next project's decisions.

PART V: WHY THIS MATTERS

Every skill in this series points back to the same place: what people think of you when they think of your work. Time management creates the capacity and priority management, discussed next, decides what deserves it. Managing expectations links the two; this skill determines how all of it is perceived since a requester's satisfaction depends on whether the work matches what they were told to expect, not just on the work itself.

Trust is built less by any single success than by the accumulation of small, kept promises: a deadline honored, a concern raised early, an alternative offered instead of a flat “no”. Each is a deposit that pays out later in giving you the benefit of the doubt and extending goodwill when something inevitably goes wrong. Professionals who manage expectations well are not the ones who never disappoint anyone. They are the ones whose disappointments are rare, well communicated, and never a surprise.

A professional who studies a request, knows their own capacity, and can offer an alternative instead of panicking carries a calm that cannot be faked. Over time, that calm becomes indistinguishable from your professional identity: people stop noticing that you manage expectations well and simply expect it of you, the same trust extended to any specialist whose judgment has already proven reliable. Very little in a career compounds as powerfully as that habit.

Expectations exist. How you conduct yourself day-to-day determines what those expectations are for you.

UP NEXT

Now that others know what they can expect from you, it is time to focus on managing and prioritizing the requests that will come your way.