



# **FIELD GUIDE**

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**SETTING CLEAR CLIENT  
EXPECTATION WITHOUT  
OVERCOMMITTING**

**TANTA GLOBAL ASSIST**

# WHAT THIS FIELD GUIDE IS FOR

Expectation setting is not about saying no. It is about defining what work looks like before misunderstandings appear.

This field guide focuses on protecting service quality through clarity, not restriction.

## Why This Practice Matters in Client Work

Clients assume silence means agreement. Unclear boundaries lead to overcommitment, rushed work, and hidden frustration.

Poor expectation setting results in:

- Scope creep disguised as helpfulness
- Missed availability assumptions
- Unspoken dissatisfaction
- Burnout framed as dedication

**Clear expectations protect both the client and the VA.**

## Core Principles

- Clarity prevents conflict
- Boundaries enable consistency
- Availability must be explicit, not implied
- Saying yes without clarity is not professionalism
- Good expectation setting happens early, not reactively

# Common Failure Patterns

- Agreeing to vague requests
- Assuming clients understand VA scope
- Avoiding boundary conversations
- Overexplaining instead of clarifying
- Letting urgency override clarity

**These are not attitude issues.  
They are communication gaps.**

# Practical Approaches That Actually Work

- State availability upfront
- Clarify what “handling” a task means
- Confirm how requests should be submitted
- Acknowledge urgency without committing prematurely
- Escalate when scope is unclear instead of improvising

## What This Practice Helps You Do

This practice helps you maintain consistency, manage workload realistically, and build client trust without overextending.



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