

# ASSUMPTION SURFACING TOOL

## Purpose

Identify unspoken expectations and assumptions before they cause issues or misunderstandings.

## Instructions

Use this tool before starting important projects, when onboarding new team members, or when experiencing persistent misalignments.

### Part 1: Assumption Categories

Consider potential assumptions across these key areas:

#### Process Assumptions

How we expect work to be done:

Assumption Area	Your Expectations	Have You Communicated This?	Potential Differences
Work pace and timing		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Quality standards		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Collaboration approach		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Communication frequency		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Decision-making method		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	

Documentation practices		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
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### Role Assumptions

Who does what and how:

Assumption Area	Your Expectations	Have You Communicated This?	Potential Differences
Responsibilities		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Authority boundaries		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Initiative expectations		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Autonomy level		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Escalation thresholds		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Success definitions		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	

### Cultural Assumptions

Unwritten rules and norms:

Assumption Area	Your Expectations	Have You Communicated This?	Potential Differences
Meeting behaviors		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Feedback approaches		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Work hours flexibility		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Response time expectations		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	

Conflict resolution norms		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Recognition practices		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	

### Outcome Assumptions

What success looks like:

Assumption Area	Your Expectations	Have You Communicated This?	Potential Differences
Priority definitions		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Trade-off decisions		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Measurement approach		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Stakeholder expectations		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Timeline flexibility		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	
Business impact focus		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partly	

## Part 2: High-Risk Assumption Identification

Based on the previous section, list the assumptions most likely to cause problems if left unaddressed:

1. \_\_\_\_\_  
Why risky: \_\_\_\_\_
2. \_\_\_\_\_  
Why risky: \_\_\_\_\_
3. \_\_\_\_\_  
Why risky: \_\_\_\_\_

4. \_\_\_\_\_  
Why risky: \_\_\_\_\_

5. \_\_\_\_\_  
Why risky: \_\_\_\_\_

### Part 3: Assumption Testing

For each high-risk assumption, use these approaches to verify alignment:

**Assumption 1:** \_\_\_\_\_

Testing approach (select all that apply):

- ☐ Direct conversation with relevant parties
- ☐ Review of existing documentation or agreements
- ☐ Sample work or prototype review
- ☐ Structured team discussion
- ☐ Anonymous input gathering
- ☐ Observation of current practices
- ☐ Other: \_\_\_\_\_

Specific questions to ask or things to observe:

\_\_\_\_\_  
\_\_\_\_\_

**Assumption 2:** \_\_\_\_\_

Testing approach (select all that apply):

- ☐ Direct conversation with relevant parties
- ☐ Review of existing documentation or agreements
- ☐ Sample work or prototype review
- ☐ Structured team discussion
- ☐ Anonymous input gathering
- ☐ Observation of current practices
- ☐ Other: \_\_\_\_\_

Specific questions to ask or things to observe:

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**Assumption 3:** \_\_\_\_\_

Testing approach (select all that apply):

- ☐ Direct conversation with relevant parties
- ☐ Review of existing documentation or agreements
- ☐ Sample work or prototype review
- ☐ Structured team discussion
- ☐ Anonymous input gathering
- ☐ Observation of current practices
- ☐ Other: \_\_\_\_\_

Specific questions to ask or things to observe:

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## **Part 4: Alignment Plan**

Based on your assumption testing, create a plan to address misalignments:

### **Clarification Needs**

What expectations need to be explicitly discussed and agreed upon?

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### **Documentation Requirements**

What should be formally documented to prevent future misunderstandings?

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### **Process Adjustments**

What changes to existing processes would improve alignment?

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### **Conversation Framework**

How will you structure conversations about sensitive assumption differences?

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## **Part 5: Ongoing Assumption Management**

### **Early Warning System**

What signals might indicate assumption misalignment in the future?

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How will you monitor for these signals?

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### **Regular Checkpoints**

When and how will you review assumption alignment going forward?

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### **Psychological Safety Maintenance**

How will you ensure people feel comfortable surfacing assumption mismatches?

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## **Additional Context:**

Assumptions are like invisible expectations - powerful but often unexamined.  
Remember:

- **Different isn't wrong** - Varied assumptions often come from different experiences and contexts
- **Cultures create assumptions** - Organizational, professional, and national cultures all shape implicit expectations
- **Experience blinds us** - The more expert you are, the harder it can be to see your own assumptions
- **Prevention beats correction** - It's far easier to align assumptions early than to repair the damage from misalignment
- **Ongoing practice matters** - Assumption surfacing should be a regular habit, not a one-time exercise

The most effective teams regularly make the implicit explicit, creating shared understanding rather than assumed alignment.

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