



2005  
Professional Development Symposium



# *Expectation Management (EM):*

A “Gateway Key” to  
Project Success –  
Client Satisfaction

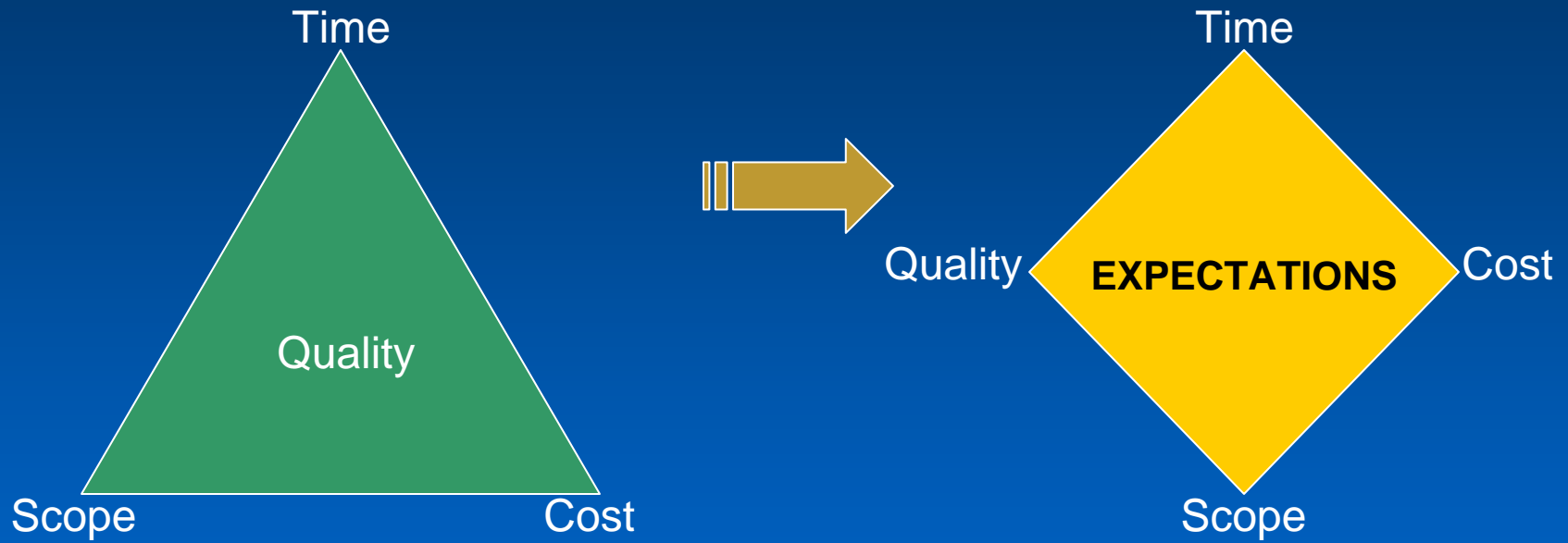


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# *Project Management*





# *What is EM?*

## Expectations:

1. Are a primary motivation for your success

2. Drive ALL of your actions and decisions



# Why all the Hype?



No, he's not coming back!

He's coming back!

Could you possibly say you were NOT coming back?  
Probably Not!



# *Why all the Hype?*

???"We don't have a training budget."

???"This is our sponsor's favorite subject."

???"I don't trust you enough to discuss this."

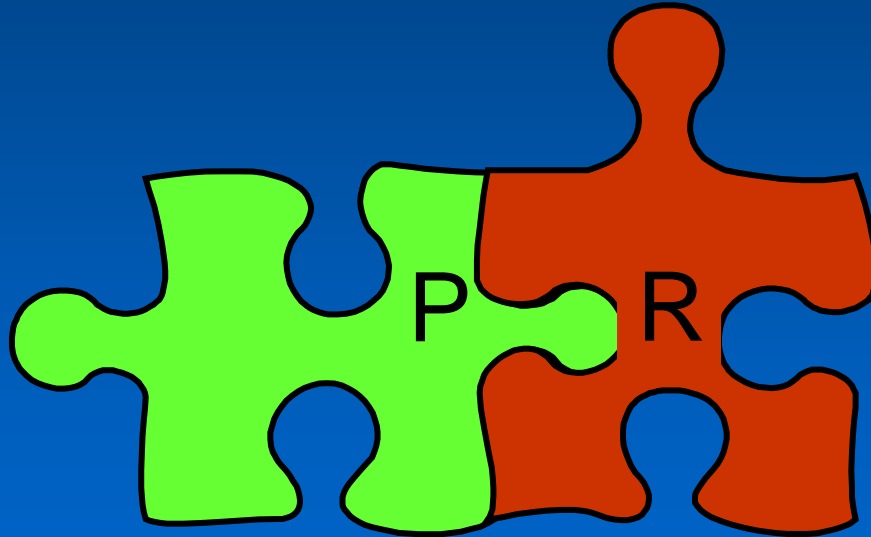
???"Short meetings?" "Infrequent meetings?"



# *Why all the Hype?*

The hype (or KEY) here is to align perception and reality!

Perception + Reality = PR



# *Tag You're It! Who?*

Everyone on the project team should be involved in EM.

External EM:

Project Managers

Account Managers

Marketing Managers

Contract Managers

Customer Facing Staff



# *Tag You're It! Who?*

Everyone on the project team should be involved in EM.

Internal EM:

Exec/Sr. Management

Sub-contractors

Minions



# *Tag You're It! Who?*

Principal stakeholders who need their expectations managed are:

**PROJECT SPONSOR(S)**

**END USER(S)**



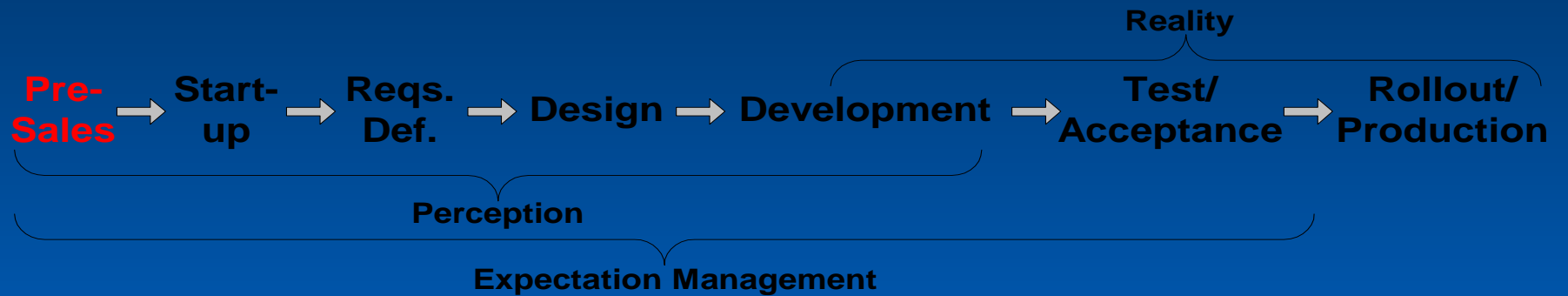
# *When to Manage Expectations?*



*Expectation management, especially between a supplier and potential client, should begin at the point of first contact between the vendor and prospective customer.*



# When to Manage Expectations?



# *How to Manage Expectations?*

1

2

3

Set

Monitor

Influence



# ***How to Manage Expectations?***

**A tool for setting and monitoring expectations: Expectations Management Matrix (EMM)**



# How to Manage Expectations?

<b>PRIORITIES →</b> ↓ <b>MEASURES OF SUCCESS</b>	<b>Max or Min</b>	<b>Constrain</b>	<b>Accept</b>
<b>Cost</b>			
<b>Schedule</b>			
<b>Scope and/or Quality</b>			

Priorities: P1, P2, and P3 are set by System Owner; PM enforces rules of matrix!



# How to Manage Expectations?

## EMM for Moon Mission

<b>PRIORITIES →</b> ↓ <b>MEASURES OF SUCCESS</b>	<b>Max or Min</b>	<b>Constrain</b>	<b>Accept</b>
<b>Cost</b> <ul style="list-style-type: none"><li>• \$20 billion (estimated)</li></ul>			<b>P3</b>
<b>Schedule</b> <ul style="list-style-type: none"><li>• 31 Dec. 1969 (deadline)</li></ul>		<b>P2</b>	
<b>Scope and/or Quality</b> <ul style="list-style-type: none"><li>• Land a man on the moon</li><li>• Get him back safely</li></ul>	<b>P1</b>		



# How to Manage Expectations?

## Another EMM Example

<b>PRIORITIES →</b> <b>↓ MEASURES OF SUCCESS</b>	<b>Max or Min</b>	<b>Constrain</b>	<b>Accept</b>
<b>Cost</b>		<b>P2</b>	
<b>Schedule</b>			<b>P3</b>
<b>Scope and/or Quality</b>	<b>P1</b>		



# ***How to Manage Expectations?***

## Another EMM Example – Possible Courses of Action

- Resources (cost and/or schedule) may be reallocated.
- Budget might be increased, but may be offset by additional planned schedule slippages.
- User requirements (or quality) might be reduced.
- Finally, measurement priorities can be changed.



# ***How to Manage Expectations?***

## Final Comments on Priority Changes

1. Priorities may change more than once during a project
2. EM can be achieved through any combination of priority changes and resource adjustments
3. System owners can initiate priority changes even if the project is on schedule



# *How to Manage Expectations?*

## Influencing Expectations

1. Establish trust.

2. Communicate/educate ...

3. Explain why.

4. Influence in private.



# *How to Manage Expectations?*

## Influencing Expectations

5. Show them, and then sell them.

6. Prototyping

7. Balance the give and take.

8. The sooner the better.



# ***Some Closing Thoughts***

All people have expectations that drive the way they interact:

- Understanding/responding is an art for managers
- EM is the discipline
- “How to” strategies are techniques within discipline

