

Jeff Oltmann on Mastering Projects

Manage Expectations by Using Formal Communications

A Key Survival Skill

To survive tough projects, experienced project leaders deliberately manage the expectations of their stakeholders. First, they use their emotional intelligence skills to forge key relationships, establish trustworthiness and build reputations as truth tellers. I described how to do this in the previous article, "How to Avoid Expectation Collisions."

This is necessary, but not sufficient. This article shows you how to complement informal relationship building with formal project communication techniques that keep the right people informed about important project information.

Increase Flexibility with a Baseline and Ground Rules

1 Create and intensely manage a baseline. The starting point for managing expectations about a project is a clear baseline, established and communicated early in the project. A baseline is simply a public summary of expectations (at an appropriate level of detail) about how long a project will take, what it will cost and what it will deliver. It may be changed at any time through mutual agreement.

Crucial conversations with stakeholders about project realities are nearly impossible without a previously established baseline and protocols about how changes will be managed. Because the people having the discussion don't have common reference point, it is likely to deteriorate into an argument about "he said, she said."

Author Eric Verzuh notes that many

Your Sacred Duty to Disappoint

Only by disappointing the project champion with [bad] news in the beginning can you delight him in the end ... Otherwise you end up being a slave to his unrealistic expectations, and instead of guaranteeing success, you're almost certain to produce failure.

David Schmaltz, quoted in Dealing with a Project's "Fuzzy Front End," by Loren Gary, Harvard Management Update, June 2003

communication problems are rooted in changes to features, schedule or cost. Head them off by defining clear protocols to manage the initial definition of these elements and subsequent changes to them.

When creating a baseline, don't allow unrealistic expectations about the project to go unchallenged. As David Schmaltz says, "Remember your sacred duty to disappoint," even though it may be uncomfortable (see sidebar above).

2 Establish ground rules early. Early on, take the lead to create and get buy-in on the management approaches that will be used on a project. Agreeing on ground rules in advance makes it easier to maintain the discipline of using them when the going gets tough, thus keeping expectations aligned. Here are some examples.

- How will risks and issues be identified and resolved?
- How frequently will project status be communicated and to whom?
- What are the boundaries of the

team's responsibility and authority?

A clear baseline and ground rules don't create a straitjacket – they actually increase flexibility. When something unexpected occurs in the future, as it inevitably does on every project, they give the people working on it a reference point that helps them to quickly evaluate possible changes.

Filter a Little, Not a Lot

3 Keep sponsors “in the loop.” Experienced project leaders talk about how they pay special attention to keeping sponsors and other key contacts appropriately informed. But “appropriately informed” varies from project to project, so ask key stakeholders about their information needs and preferences.

Communicate with them more often than you think you need to. Set up-front expectations on frequency, content, and methods of communication. This will help build relationships as well as reduce the amount of misunderstood information.

4 But filter out unimportant noise. The day-to-day activities of a project are messy. While keeping key stakeholders in the loop, also filter out some of the usual project noise. Don't overwhelm sponsors, and especially customers, with unimportant details about things that will change tomorrow. At the same time, don't keep them in the dark. That is a recipe for destroying

Damage Control or Full Disclosure?

“Full disclosure is the way to go. If clients see you pretending, deflecting blame, or trying to minimize your responsibility, that's a sure way to blow their confidence in you.”

Patrick Lencioni, interviewed in Management Consulting News, 2010

their trust (see sidebar above).

Endpoint

Managing stakeholder's expectations about projects involves three elements:

- Building a network of informal, truth-telling relationships, as I covered in the previous article
- Setting up a clear project baseline and communication protocols, discussed here
- Creating an unbiased status reporting and project review system, which I will cover in the next article

These three elements work – I've used them successfully on my own projects, both large and small. My clients and students have used them. You too can apply them to successfully manage the expectations of even your most challenging stakeholders.

About the Author

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