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Effective Expectations Management

In the final analysis, any claim to project delivery success depends largely on the degree to which we have met the expectations of our stakeholders. This course dives deep into the definition of what an expectation is, reveals how expectations operate in stakeholders, examines the impact of expectations that are not aligned with the project plan, and examines steps that the project manager can take to keep stakeholder expectations in alignment with the objectives of the project. Participants are shown tools that allow the discovery and management of expectations commonly encountered among stakeholders and team. Topics include:

- Definition of expectation
- How expectations work in the stakeholder
- Importance of Expectations Management
- How to uncover hidden expectations
- Confirming expectations
- Management of expectations throughout the project life cycle
- Importance of stakeholder alignment to plan
- What to do when expectations do not match plan
- What to do when expectations are not met
- Expectations Management tools

Who should attend

This course is of special value to project managers, managers of project mangers, functional managers with project responsibility, and Project Management Office staff.

Prerequisites

This course assumes familiarity with basic project management concepts as well as some experience in the planning and execution of projects.

Course Information

- **Course I.D. Number:** 3030   **Typical class size:** 6 to 20 attendees
- **Duration**: 1 Day   **Delivery**: Virtual or onsite
- **Participants receive:**
  o PMP®-certified instructor
  o Comprehensive Participant Guide
  o High-quality templates
  o Certificate of Participation
  o 7 PDUs (Technical: 6   Leadership: 1   Strategic: 0)

Why should I take this course?

- This course will help you and your project team to avoid much of the turmoil that can hurt a project simply because expectations were not understood.
- *Effective Expectations Management* delves into areas of project management that, although seldom discussed, are nonetheless central to project success. Take home a whole new set of tools and techniques.
- Take this course and learn what you can do to ensure that everyone is defining success the same way, and then make that success happen.

Course Outline

Section 1: Introduction

- Traditional Definition of Project Success
- Real Project Success
- The Challenge

Section 2: Expectations Management

- Business Value
- Managing Project Constraints
- Managing Expectations
- Managing Projects
- In the PMBOK Guide®
- The Language of Expectations

Section 3: Understanding Expectations

- Example Expectation Statement
- Attributes of Expectation
- Stakeholder Expectation – A Definition
- How Expectations Work
- Consonant & Dissonant Expectations
- Intensity
- Why Expectations are Important
- What We Can Do About Them

Section 4: Know Your Audience

- How to Manage Expectations – Overview
- Stakeholder Analysis Tools
- Prioritizing Stakeholders

Section 5: Discovering Expectation

- Expectations Identification
- Expectations Discovery Tools
- Expectations Analysis Worksheet
- Discovering Expectations within Complaints
- Project Team Expectations

- Missed Expectations
- Confirming Expectations

Section 6: Initiation: Setting Expectations

- Setting Customer Expectations
- Vendor Expectations
- Alignment with the Project
- Points of Project Alignment
- SOW / Charter Content

Section 7: Managing Expectations

- Tracking Expectations
- Management Options
- Project Manager Options
- When the project manager Must Act
- Preventive Actions
- When Expectations are not met

Section 8: Managing Expectations during Planning

- Include Stakeholders in Planning
- Quality
- Requirements
- Respond to Unreasonable Requirements
- Responsibility Assignment Matrix

Section 9: Managing Expectations during Execution and Close

- Periodic Confirmation of Requirements
- Status Reports
- Issue Management
- Formal Change Control

Summary and Review

This course includes 18 hands-on exercises and facilitated discussions that facilitate learning and retention. Course material is fully PMBOK® and BABOK® compliant.

Learning Approach

- A highly experienced instructor will use interactive lecture format, hands-on exercises, team activities, group discussions and other techniques to drive home the essential points of this material
- We will build on your prior experience in this topic, while providing you with a structure and vocabulary to use in all of your future projects.
- If you have modest project management knowledge, you will find that the clarity of the material and direct presentation style of the instructor will make the subject matter easy to understand.
- You will receive a Participant Guide which will help you follow the material, take notes and retain what you learned so that you can apply it on your job.