CVR / IT Consulting

Commitment / Vision / ResultsSM

Office: (919) 495-7371
Fax: (919) 556-0283
Toll free: (800) 877-8129
Email: info@cvr-it.com
Web site: www.cvr-it.com

Effective Expectations Management

Course Overview

The Challenge

In the final analysis, our claim to project delivery success depends largely on the degree to which we have met the expectations of our stakeholders. The importance of this topic is indicated by the inclusion of a new knowledge area in Release 5 of the PMBOK Guide®, and its emphasis on management of stakeholder expectations. It has become clear that mastery of the identification, management and satisfaction of stakeholder expectations is of primary importance if we are ever to have reliably successful projects.

The Solution

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. You will be shown the use of 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 will be 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

- **Duration:** 1 day
- **Typical class size:** 6 to 30 attendees
- **Participants receive:**
  - PMP®-certified instruction
  - Comprehensive Participant Guide
  - High quality templates related to the topic

- o Certificate of Participation
- o 7 PDUs / Contact Hours in project management education
- **Course I.D. Number:** 3030

Course Outline

Section 1: Introduction

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

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 Checklist
- Expectations Analysis Worksheet
- Expectations Chart
- Discovering Expectations within Complaints
- Project Team Expectations
- Missed Expectations
- Continual Discovery
- 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. 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.

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.

Cost and Availability

We can arrange onsite training to suit your requirements. See our website for the latest pricing information:

http://www.cvr-it.com

Licensing

This course is available under license to qualified Training Providers. We deliver a full set of courseware materials including instructor slides, instructor manual and student guide. Train the Trainer instruction is available to ensure that all providers adhere to the same high level of course delivery. For more information, see:

http://cvr-it.com/CoursewareExpress/