

Managing Stakeholder Expectations: Effective Expectations Management

Course Summary

Description

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.

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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

- 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

Audience

This course will be of special value to project managers, managers of project managers, 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.

Duration

One day

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Course Outline

- I. Introduction**
 - A. Traditional Definition of Project Success
 - B. Real Project Success
 - C. The Challenge
 - D. Agenda
- II. Expectations Management**
 - A. Business Value
 - B. Managing Project Constraints
 - C. Managing Expectations
 - D. Managing Projects
 - E. In the PMBOK Guide®
 - F. The Language of Expectations
- III. Understanding Expectations**
 - A. Example Expectation Statement
 - B. Attributes of Expectation
 - C. Stakeholder Expectation – A Definition
 - D. How Expectations Work
 - E. Consonant & Dissonant Expectations
 - F. Intensity
 - G. Why Expectations are Important
 - H. What We Can Do About Them
- IV. Know Your Audience**
 - A. How to Manage Expectations – Overview
 - B. Stakeholder Analysis Tools
 - C. Prioritizing Stakeholders
- V. Discovering Expectation**
 - A. Expectations Identification
 - B. Expectations Discovery Tools
 - C. Expectations Checklist
 - D. Expectations Analysis Worksheet
 - E. Expectations Chart
 - F. Discovering Expectations within Complaints
 - G. Project Team Expectations
 - H. Missed Expectations
 - I. Continual Discovery
 - J. Confirming Expectations
- VI. Initiation: Setting Expectations**
 - A. Setting Customer Expectations
 - B. Vendor Expectations
 - C. Alignment with the Project
 - D. Points of Project Alignment
 - E. SOW / Charter Content
- VII. Managing Expectations**
 - A. Tracking Expectations
 - B. Management Options
 - C. Project Manager Options
 - D. When the project manager Must Act
 - E. Preventive Actions
 - F. When Expectations are not met
- VIII. Managing Expectations during Planning**
 - A. Include Stakeholders in Planning
 - B. Quality
 - C. Requirements
 - D. Respond to Unreasonable Requirements
 - E. Responsibility Assignment Matrix
- IX. Managing Expectations during Execution and Close**
 - A. Periodic Confirmation of Requirements
 - B. Status Reports
 - C. Issue Management
 - D. Formal Change Control
 - E. Summary and Review