

Project Management

Expectation Management

One important factor associated with project success is meeting stakeholder expectations. Not properly managing these expectations throughout the entire project life cycle is also one of the most common project management mistakes. However, everyone has the experience of managing expectations resulting from every day life activities. This can also be applied to managing project expectations.

One common response when things go wrong in a project is "You should have managed their expectations". The issue is that different stakeholders have different expectations that are influenced by unique factors such as:

- *Past experience* both good and bad
- *Documentation* such a scope statement, email, and requirement documents
- *Conversations* both formal and informal
- *External Influences* such as peer interactions, Federal regulations, and news media

As a result, it's not enough to simply document expectations early in the project life cycle. Project expectations are based on stakeholder perception that will change throughout the life of the project. Perception is influenced by how well stakeholders understand what is going on with the project and how it may impact their lives. The challenge is closing the gap between expected and perceived value. Accomplishing this is the goal behind expectation management and requires working closely with stakeholders to mold their perception of what will be delivered through completion of project activities.

One concern when working towards this goal is that the minute a message is presented to stakeholders it often becomes an expectation. One example relating to project schedules may be that if a project manager states that a project will be completed within 4-6 months the expectation is not 6-months, the expectation is 4-months. It's important to always be conscious of the impact communication may have on stakeholder perception and constantly look for, and be aware of, changing stakeholder

expectations that may be a result of changes in perception.

When communicating with stakeholders it's important not just to hear what is communicated but to understand the expectation resulting from that communication. If a difference between reality and expectation is uncovered, make adjustments, close the gap, and bring them back to reality. Managing expectations in a way that influences stakeholder perception is a process that should continue throughout the life of a project. Some critical factors that help manage expectations include:

- Communication, both formal and informal
- Communication and confirmation of what was heard and understood
- Documentation to capture, review, confirm, and update expectations

The content of this article was paraphrased from a presentation by Saeed Nadjariun during the July 2007 meeting of the CDC Project Management Community of Practice (PMCoP). For more information regarding expectation management, Saeed's presentation, the CDC PMCoP, or the CDC Unified Process (UP) please visit the CDC UP website located at <http://www.cdc.gov/cdcup/>. ■

Topic of Interest

PMI Global Congress 2007 - North America is a major three-day project management educational and networking event scheduled from October 6-9.

This event gathers the know-how and inspiration needed to consolidate and put into practice key project management guidelines for project success. It's also a meeting point for experts to discuss the most challenging project management trends. Visit the Global Congress website for more information at <http://congresses.pmi.org/NorthAmerica2007/>. ■

Communication Management and Planning

Effective communication is a key component of successful project management and delivery. It is often estimated that eighty percent of a Project Manager's job revolves around communication with the project team, client, and executive management. Without effective communication, vital information may not be exchanged effectively. A lack of communication may even delay or prohibit the execution or completion of scheduled tasks. Project success increases exponentially by avoiding communication issues.

The goal of communication management planning is to define the project's structure and methods of information collection, screening, formatting, and distribution. It also outlines understanding among project teams regarding the actions and processes necessary to facilitate the critical links among people, ideas, and information that are necessary for project success. Effective communication planning and management helps ensure:

- Information needs of project stakeholders are met
- Project performance is tracked and reported on
- Project results are formally documented
- Enthusiasm and support for the project

Most projects will require some form of internal and external communication on a regular basis to sustain momentum on the project and to fulfill organizational reporting requirements. To effectively accomplish and manage this, a Communication Management Plan should be developed.

A Communication Management Plan is a platform for understanding between project participants; it documents the methods and activities needed to ensure timely and appropriate collection, generation,

Upcoming Project Management Community of Practice Meetings and Topics

- **Friday, August 24**
Business Analysis
-
- **Friday, September 28**
Project Management Tips for Delivering on Schedule
-
- **Friday, October 26**
Effective Project Management for Public Health IT Initiatives
-
- **Friday, December 7**
The Inadvertent Project Manager

dissemination, storage, and ultimate disposition of project information among the project team and stakeholders. The Communication Management Plan also defines who will not have access to information and what type of information will not be distributed.

The Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK) defines a Communication Management Plan as a document that describes "*the communications needs and expectations for the project; how and in what format information will be communicated; when and where each communication will be made; and who is responsible for providing each type of communication*". Key elements of a Communication Management Plan include answers to the following types of questions:

- WHO do you need to talk to?
- WHY are you talking to them?
- WHAT do they need to know?
- WHEN do they need to know it?
- HOW do you communicate with them?
- WHERE do you tell them (communication medium)?

The Communication Management Plan documents a consistent method for communication and the management of that communication throughout the project's life and should be developed in coordination with, and be accessible to, all project team members and stakeholders.

For additional information on communication planning and management, how to apply it to a project, and other relevant project management tools, templates, checklists, and more, or the CDC Unified Process, visit the CDC UP website at <http://www.cdc.gov/cdcup/>. ■

Contact the CDC Unified Process Team

The *CDC Unified Process Project Management Newsletter* is authored by Daniel Vitek MBA, PMP and published by the National Center for Public Health Informatics.

For questions about the CDC UP, comments regarding this newsletter, suggestions for future newsletter topics, or to subscribe to the CDC UP Project Management Newsletter please contact the CDC UP Team at cdcup@cdc.gov

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