

Expectation Management: The unsung skill

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Introductions

Michael George

- Global Program Manager at Hewlett Packard
- 25+ years in leading and mentoring programs and operations in a wide range of business functions
- Mechanical Engineering degree with professional certifications
- Focus on business optimizations, integrations, and capabilities enabling cost management and revenue growth
- Specialties
 - Planning clear actions from strategies
 - Managing Programs and Operations
 - Developing customer solutions
 - Handling Risk and MOC
 - Relationship building

I am NOT a psychiatrist or hold any degrees in psycho analysis ...

In this presentation we will cover

- What is important to know about expectations
- Who influences expectations
- Why care
- Managing Expectations
- Closing

What is important to know about expectations

- What are they? Are they the same as requirements, musts, wants, ...?
 - Expectations are much more broader and deeper than requirements
- Layman's Definition:
 - "preconceptions" or "anticipations"
 - What do you expect happens to the orange market when a cold snap hits CA?
- Dictionary Definition
 - "a strong belief that something will happen or be the case in the future"
- How are they created? ... they are learned
 - Life experiences
 - Education
 - Interactions
 - Observations ...
- How they are changed? ... same as how they are created

Key Take-Aways:

- Future Looking
- Learned
- Can be changed

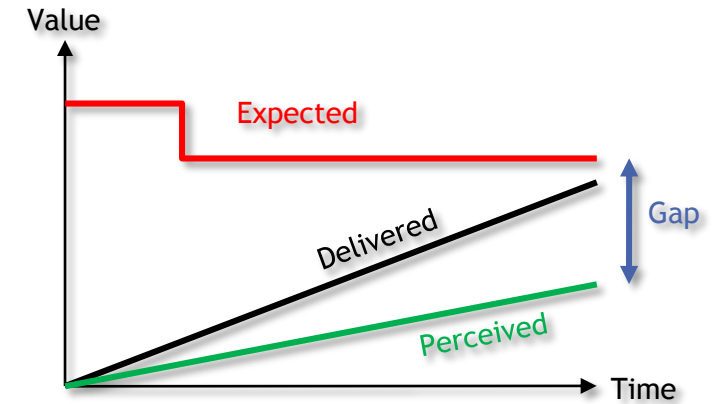
Who influences our expectations

- The news
 - Packing clothes for trips
 - Michael Jordan expected to retire, but then he came out of retirement (93-95) with all the media hype ^{2,3}
- The government
 - Typically there is uncertainty in markets, but people borrow adjustable mortgages when Fed sets low short term rates ¹
- Families
 - Expect dinner to be at the table at six, but it becomes Taco Bell when back to school meetings are announced
 - Expect success when you plan ahead well
- Job
 - Expect politics, Expect missing requirements, Expect risks, Expect change resistance
- We ...you and me

Our expectations are always being validated and reset ... likewise we are constantly validating and resetting others

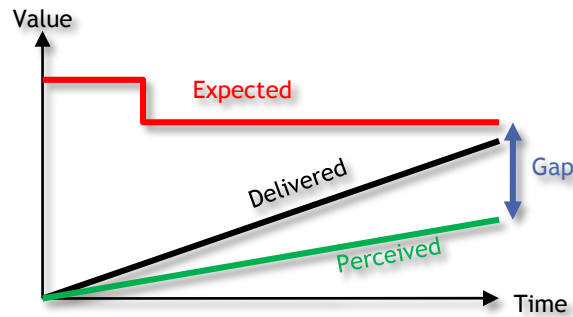
Why care about other's expectations

- It determines your success or failure
 - Professionally
 - Personally
- In a given project there is
 - Expected Value = What the client sees as the future
 - Delivered Value = What you delivering now
 - Perceived Value = What the client sees now
- Expectation Managing ... for our definition here ...
 - Is managing the gap between the Expected Value and the Perceived value
 - NOT how close you were to the contract, the requirements, or the scope.
 - The size of these gaps defines the level of success
 - Sometimes it is not possible to close the gaps fully, but you can get them very close.



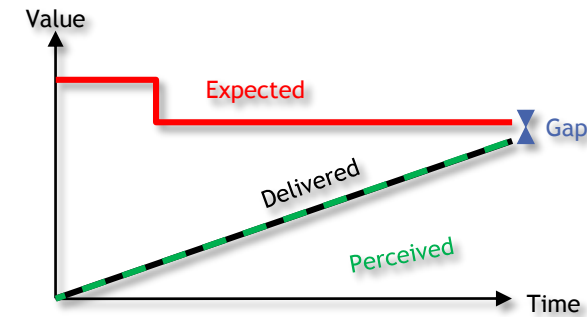
Why care example

The market asks for a sports car with lots of horsepower, lots of torque, with an huge engine size



- ✓ Lots HP
- ✓ Lots TQ
- ✓ Huge Engine

- × Was not a sports car feel ...
Squirrely, hard ride, road noise,
touch steering, white knuckle ...
More of a race car.



- ✓ Lots HP
- ✓ Lots TQ
- ✓ Huge Engine

- ✓ Enjoyable to drive ... I can leave
other cars behind, holds the road
firm, comfortable features to drive
on the roads, I can talk to the
passenger ... a sports car

You can't manage what you don't understand

- To begin to understand
 - Listen ... to both direct and indirect communications
 - Ask ... to clarify in mutually understood terms
 - State ... to verify expectations are aligned
 - Agree ... to how to define fulfilling expectations

Keep in the back of your mind differences in cultures, use of slang/acronyms, backgrounds, ... etc

Indirect Communication Examples

There are NO correct answers ...

- **a. “What we need is a very user-friendly system.”** Could be:
 - “Our biggest sponsor is the department with the least qualified people,” or
 - “I expect user testing to be very exhaustive,” or:
 - “We don’t have a training budget.”

- **b. “You’ll have to watch this very carefully.”** Could be:
 - “This is where we have the highest risk,” or
 - “This is our sponsor’s favorite subject,” or
 - “I’ll be breathing down your neck.”

- **c. “I didn’t read your report.”** Could be:
 - “I don’t read long reports,” or
 - “I don’t get any value from your reports,” or
 - “I expect verbal presentations.”

You can't manage what you don't understand

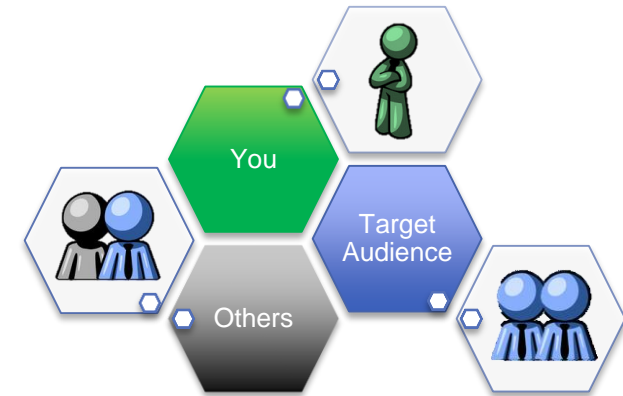
- **AGAIN ...** To **begin** to understand
 - Listen ... to both direct and indirect communications
 - Ask ... to clarify in mutually understood terms
 - State ... to verify expectations are aligned
 - Agree ... to how to define fulfilling expectations
- When you understand
 - Take note and document
 - Don't always put in a requirements document
 - Documenting helps in closing the gaps
- So what's next? Manage Expectations¹
 - Set
 - Monitor
 - Influence

Setting Expectations as a PM

- Setting expectations requires communication⁴
 - Listen, Ask, State, Agree
 - Demonstrate, 1-1, group
 - Document ... even verbal agreements to be verbal!
- Push back is OK⁵
 - Understand and be comfortable with expectations
 - If not ... push back and balance need vs team ability
 - Be open to what the team can do
 - Trusting your team will set other expectations as well
- Set expectations for all project areas
 - Roles, Communications, Structure, Goals
- Building expectations on a foundation you can control is key⁶

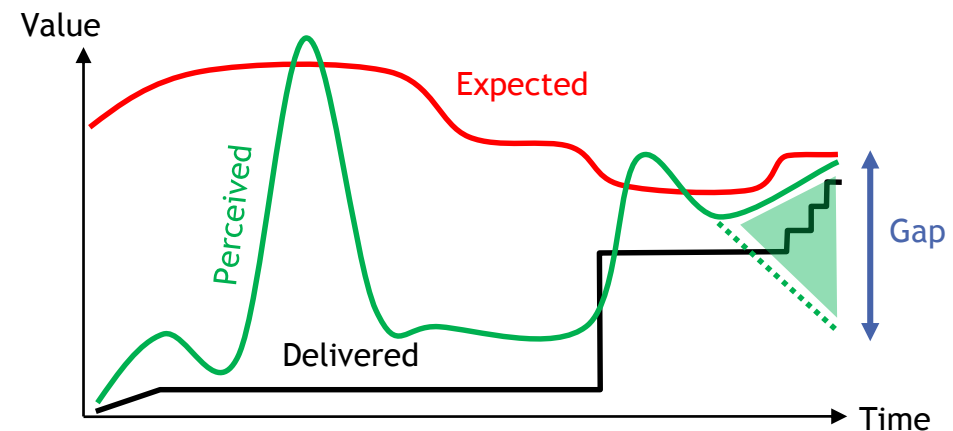
Monitor Expectations as a PM

- Listen
- Communicate, Communicate, Communicate⁵
- Proper communication mitigates your project risks
- Techniques⁵
 - Frequent interaction
 - Over-communicate at critical spots
 - Don't be redundant, keep to communications expectations set
 - Frequent Check Ins
 - Formal and informal or ad hoc meetings
 - Pro-Active
 - Consult with stakeholders on expectations or project risks ... ask for ADVICE
 - Listen to concerns from stakeholders and team members
 - Open and Honest
 - Being honest in a delay is 1000x better than miss a deadline

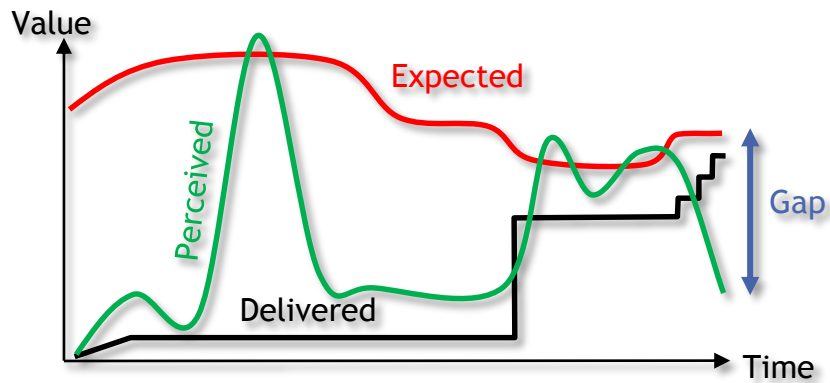


Monitor Expectations and Perceptions

- Tomorrow's expectations are impacted by today's perceptions
- They change
- Monitor **BOTH** constantly
 - Listen
 - Communicate
 - Educate
- To ensure success
 - Perceptions may have to be corrected
 - Project changes may be required
 - Expectations may have to be influenced

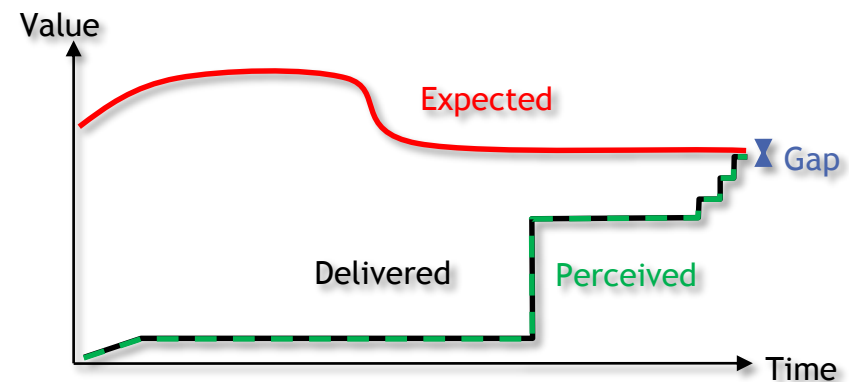


Two possible realities



Questionable Success

- Assume project meets scope
- Expectations erratic
- Client not in touch with project really
- Client not happy in the end

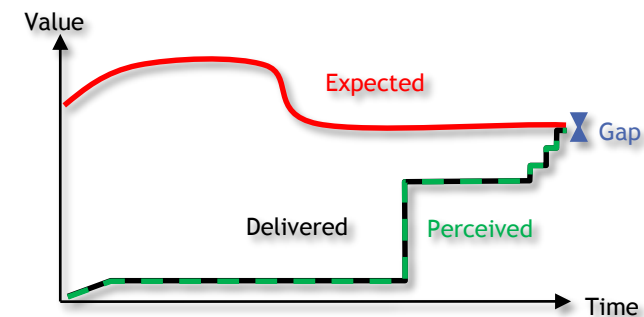
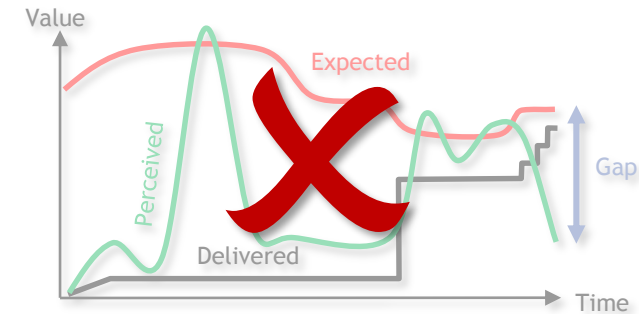


Likely Success

- Assume project meets scope
- Expectations influenced when needed
- Delivered Value = Expectations = Perceptions
- Client kept abreast with reality
- Client expectations met

Influencing Expectations as a PM

- Requires high level of confidence
- Expected to do it full time
- Techniques
 - Establish trust
 - Educate, educate, educate
 - Explain why
 - Influencing in private
 - Show them and then sell them
 - Balance the give and take
 - Sooner is better than later ... later is better than NEVER
 - Listen
- Expectation management is not a one way street
 - And the street may be in foreign land ... remember cultures



Closing

- Listen, Ask, State, Agree DOCUMENT
- All these techniques work, you need to determine which works best for you
- Regardless of your role ... you need to manage expectations
- Expectations can be influenced
 - Do you still expect abbreviations like “OMG” to come from valley girls in the 1980’s?
- Questions?

Reference Information

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Executive Summary

- Expectation Management: The unsung skill
 - Learn who is setting your expectations and how you can be better prepared.
 - Learn basic expectation management skills and how to use them to increase your project success and avoid expectation failures.
 - Learn the nature of expectations and tools for setting, monitoring, and influencing them.

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- About the presenter

Michael George is a Global Program Manager at Hewlett Packard with 25+ years in leading and mentoring programs and operations in a wide range of business functions. He holds a Mechanical Engineering degree with professional certifications. His focuses on business optimizations, integrations, and capabilities enabling cost management and revenue growth. His specialties are planning clear actions from strategies, managing programs and operations, developing customer solutions, handling risk and change, and relationship building.