

Managing Great Expectations

Did you ever ask for an outrageously expensive brand-name toy for your birthday – and then received a generic version that just didn't have the same cachet?

And then found that you couldn't bring yourself to play much with it because it just didn't live up to your expectations?

Well, end-users of new software systems often feel the same way. In fact, failure to manage user expectations is one of the biggest risks to project success when project managers are implementing new software systems.

Research demonstrates that users who harbour unrealistic expectations are more likely to be dissatisfied with the project outcome and less likely to take best advantage of it.

Fortunately, this is one risk factor that project managers can influence and minimize, according to Professor Stacie Petter at the University of Nebraska at Omaha. The key, she says, is to work with the users and keep them involved, establish leadership and gain user trust.

Petter recently completed a research project that defines practical tactics that project managers can use to align user expectations with project delivery.

She and another researcher interviewed project managers from a global IT and consulting company with more than 75,000 employees across almost 50 countries.

Petter asked each project manager to recall two projects in which they faced challenges in managing user expectations – one that they managed successfully and one that they felt wasn't successfully managed.

She then analyzed their responses, drawing out successful tactics for involving the user, establishing leadership and gaining trust – the three strategies that she discovered are key to managing user expectations. Her findings:

Involve the Users

“Every textbook,” says Petter, “advocates involving the users, but it's often done badly. People think that one meeting with the users is enough.” The value of this research is that it proposes actionable tactics. Project managers should ask themselves how well they do the following:

- Communicate. Get users involved early in the project and *keep them involved* throughout.
- If the user base is large, create small user groups.
- Listen to them, ask questions and give credit for good suggestions.
- Let users make tough choices about budget, schedule and/or functionality.
- Recognize their concerns about change and help them to feel at ease.
- Build positive momentum and continue it throughout the development phase.
- Offer training, help desks and other support functions to maintain comfort and involvement during implementation

Establish Leadership

“There are two types of leadership that need to be exhibited during a software project to properly manage user expectations,” says Petter. “A project champion for the users and a project manager/leader for the team.”

The project champion, she says, helps to manage expectations by promoting the project vision, educating users about the software’s values and benefits, and by rallying the ‘troops’ and explaining how they can assist. One interviewee recommended choosing someone who is influential, well respected and well connected within the client organization.

The project manager, says Petter, must lead both project colleagues and users along the correct path. “To do this, the project manager needs to be knowledgeable about the business problem, the system’s technical aspects and also project management.”

For a successful outcome, she says, a project manager should also:

- Articulate a clear view of the project
- Ensure you have a strong project champion to share the vision
- Educate users about the value and benefits of the system, while also ensuring they have reasonable expectations
- Obtain buy-in from the primary, or most vocal, stakeholders and work outward
- Don’t oversell the project
- Motivate the project team to complete on time

Finally, says Petter, the project manager needs fortitude. “Be strong with users,” she says. “If they ask for additional functionality, it’s important not to simply agree to every request.” Instead, initiate a formal change-request process and educate users about the consequences of any changes.

Establish Trust

Project managers who involve users and develop a relationship with them will be on their way to establishing trust. Petter notes that there are other important tactics for gaining and maintaining trust:

- Use clear terminology. For instance, inform users they will see a prototype in one week, not ‘soon’.
- Be willing to share both good and bad news throughout the project - don’t leave others to disseminate such news.

Overall, says Petter, “the tactics for managing user expectations that we’ve identified in our research aren’t complex. They’re really quite simple.

“Yet if software project managers truly understood and followed these tactics, managing user expectations would not be among one of the three highest-ranking risks in software projects.”

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PMPerspectives.org is a website which connects project managers and sponsors with project management researchers. Our mission is to understand and improve project management practices. The research team comprises Dr. Blaise Horner Reich and Dr. Andrew Gemino from Simon Fraser University, Canada and Dr. Chris Sauer from Oxford University, UK.

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