Fostering Success through Managing Expectations

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OCT 22, 2001 1:00am ET

During the course of a data warehousing or business intelligence (BI) project, there will be at least one point during the project where expectations are not in line with the design, approach or solution. All project managers have encountered this misalignment of expectations. Seasoned and effective project managers know that it is imperative to address and manage expectation so that the solution being developed achieves the desired outcome. Failed projects are typically the result of mismanagement of expectations whereby the solution that was developed did not meet the expectations of the user community.

Several years ago, we saw such a failure take place. At a prospective client an enterprise resource planning (ERP) system was being implemented to replace their legacy systems. In order to facilitate information from the ERP system, they wanted to implement a BI application to enable users to easily access the data so that they could develop their own queries and reports. Their process of identifying and selecting an external professional services firm was long and drawn out. By the time they had developed their short list of firms, two months had passed. This directly impacted the BI project time line.

Unfortunately, the go-live date was already established and communicated to the users. With management unwilling to change the go-live date and user expectations that were impossible to achieve, we declined the project and explained our concerns. Another professional services firm was selected and attempted to design, develop and implement the desired solution. Unfortunately, this firm was unable to meet the expectations of the user community, and the solution that was developed was eventually shelved. Shortly thereafter, we were contacted by management, who validated our original concerns, and asked us to reconsider the engagement.

While the previous case has been an isolated incident for us, I believe that most projects fail because expectations are not properly managed.

Through my years of experience in managing and advising data warehousing and BI projects, I have found that the following list of skills and tasks help to foster success through management of expectations:

1. **Know What You are Doing** In order to be an effective project manager for a BI or data warehousing project, you must have an understanding of the technology and the business requirements for the solution at hand. In addition, fundamental project management skills include time management, organizational and communication skills, and being personable.

2. **Be Honest and Forthright** If you don’t know or if it can’t be done, say so and explain why. At times, the pressure on a project manager to please the project sponsor and user community can be immense. Most new project managers fall victim to the “yes” syndrome, which inevitably leads to over commitment and potential project failure.

3. **Understand Expectations** Members of the user community will have their own expectations of the data warehouse or BI application. Not surprisingly, there may be as many expectations as the number of members of the user community. Understanding these expectations is critical to establishing the scope and managing the project.

4. **Rank Expectations** While the expectations of the user community may be numerous and far-reaching, they must be ranked in order of priority. This requires consensus within the user community as well as direction from the project sponsor. By ranking the expectations, all involved will know the relative importance of each and what is the most important expectation.
5. **Agreed-Upon Expectations** With the ranked expectations, the project manager must incorporate them into the project time frame and budget. Expectations that can and cannot be addressed within the project time frame and budget must be clearly identified and communicated to the user community. This task becomes the first active step in managing expectations.

6. **Formalize Expectations** The agreed upon expectations must be documented, typically in the project plan. They are the basis for the project scope and for the user acceptance criteria questionnaire. The goal of documenting expectations is to mitigate any ambiguity later on in the project.

7. **Assemble a Project Team that Can Deliver** Each member of the project team must have complementary skills. The team must have the experience and knowledge to deliver the desired solution. Each team member has the responsibility to understand the scope of the project, what is to be delivered, and assist the project manager in managing the expectations of the user community. No project manager wants a rogue team member setting new expectations with users.

8. **Concise and Frequent Communication** The project manager must evaluate the status of the project once a week at a minimum. This status should be communicated to the project sponsor and other interested individuals. Issues that may impact the project must be identified and addressed in a timely manner.

9. **Manage Project Scope** The scope of the project is a listing of deliverables, which was developed from user expectations. It is the responsibility of the project manager, with the help of the project team members, to manage the project scope and to identify and document out-of-scope items that will be addressed in future phases.

10. **Continuously Validate Project Deliverables to Expectations** As the project moves from definition, to design, to development and then to implementation and deployment, the project manager should continuously validate that the project deliverables correlate with users expectations.

**Conclusion**

Success has to be cultivated. It just doesn’t happen on its own. As a project manager or a member of a project team, you have the responsibility to actively manage expectations if you want the project to be a success. Understanding what you have to do to manage expectations is the first step in cultivating success.