

## 4.2

# Understanding Values and Expectations

### Learning Objectives

1. Identify methods for determining client expectations.
2. Identify methods for clarifying values and determining differences.
3. Describe the importance of dealing fairly with the client.

Two of the sources of dissatisfaction in personal and business interactions are unmet expectations and a misunderstanding or ignorance of the values held by the other party. The project manager needs to avoid having an unsatisfied client due to a clash of values or a failure to meet expectations.

### Clarify Expectations

Client expectations are expressed in chartering documents such as the scope of work, the project purpose statement, and the list of project deliverables. Other expectations exist that are more difficult to express in written documents.

## **Managing Expectations**

One project client had such a difficult time with the billing processes on her previous project that significant project management time and resources were expended on reconciling billing issues. This client has an expectation in the next project that project accounting and billing processes operate effectively and efficiently. Another client had been constantly surprised by changes and unplanned events happening on the project. This client wanted to participate early in the discussion of problems that arise during the life of the project and contribute to finding solutions and minimizing the negative impact on project performance.

Understanding and capturing these expectations in a written document is an important step in effectively meeting client expectations. Often it is the next question that enables a project manager to discover the less obvious expectations. The next question is the one the project manager asks after the initial response to inquiries about expectations. In our example, the client may express that he or she wants project billings to be accurate and timely. This is an easily understandable expectation, but when the project manager asked the next question—“Can you tell me more about what you mean?”—the client revealed the problems on her previous project, and the project team developed a better understanding of the client’s concern. The project team developed measures for tracking project billings that measured both timeliness and accuracy. This process enabled the project team to understand the client’s concern, develop work processes that demonstrated a response, and provide data to the client on the timeliness and the accuracy of the billing processes.

For the client that expected to hear about problems early and participate in the problem-solving discussions, the project team shared the project action item register and highlighted issues the team felt may be important to the client. The project manager also discussed potential concerns with the client during their weekly

project update.

After the project team captures the client expectations, the team then develops a method for tracking performance against expectations. In our example, the project team defined accuracy and timeliness in measurable terms and tracked the team performance. The project team developed a survey to track the client's perception of inclusion in the problem-solving process and tracked the client's response. These measures were then presented in the project review meetings with other measures of project performance such as cost and schedule.

As the project team meets and exceeds the client expectations, these expectations tend to change. If the goal is 85% accuracy on all project billings, and the project team begins to perform with an average of 95% accuracy or higher and never falls below 90%, then the client begins to expect 95% accuracy. This is a realistic expectation of the client; it also changes the expectation so that meeting the client's expectation becomes harder. Even if expectations change, it is important to maintain the original goal. This reminds the client at the end of the project that the project team not only met expectations but also raised them during the life of the project.

## **Clarify Values**

Values are desirable principles or qualities.<sup>1</sup> Disagreements based on differences in values are extremely difficult to resolve because compromising means compromising your values. Organizations often have developed a list of corporate values. Sometimes these are real and sometimes they are more important to the corporate brand. The project manager needs to understand the real organizational and personal values of the team members related to the project.



Image by Ministerio Secretaria General de Gobierno

## Communication Values

A large project in Washington had a client that valued prompt communication. All the members of the client's team had the latest phone technology and took calls during project meetings. The project team saw this behavior as rude and interfering with the effectiveness of the project. The client was very comfortable in this chaotic environment and valued constant communication because it provided them with a competitive advantage in their marketplace by enabling quick identification and response to opportunities. The same behavior was preventing the project team from developing a common understanding and agreeing on a project plan because they could not focus on the needs of the project long enough to develop this common understanding. The project manager and the lead client recognized the potential conflict for the project and developed a list of project

meetings that would be “cell-less,” which meant that the team members would turn cell phones off for that meeting. Other meetings would follow the cultural standards of the client.

Developing a mutual understanding of the personal and organizational values and dealing with differences during the early phases of the project will significantly reduce the potential for insolvable conflicts. This becomes more important on a large, complex project where the likelihood of a diverse project team is high, and the team may have to deal with different laws, customs, and cultural values. Developing an understanding of these differences and developing an appreciation for the value of this diversity for project team members can prevent conflict later in the project.

## Deal Fairly with the Client

During the life of the project, the project manager will often have the opportunity to take advantage of the client, either because a clause in the contract is not written accurately or because the project manager has access to more detailed information. For example, a client finds a mistake in the original documents provided to the project team. The project team analyzes the new information to assess the potential impact on the project cost and schedule. A skilled project manager can demonstrate a negative impact and increase project profits by requesting a change order. A skilled project manager can also usually find an innovative approach to finding a solution without increasing the cost or schedule. In most cases, the client wants to be treated fairly. **Fairness** is characterized by impartiality and honesty that is free from self-interest, prejudice, or favoritism.<sup>2</sup> If the client interprets the change order as fair, then the project manager has the opportunity to create a satisfied client. If the client believes the behavior of the project manager is unfair, then it is difficult to create a satisfied client.

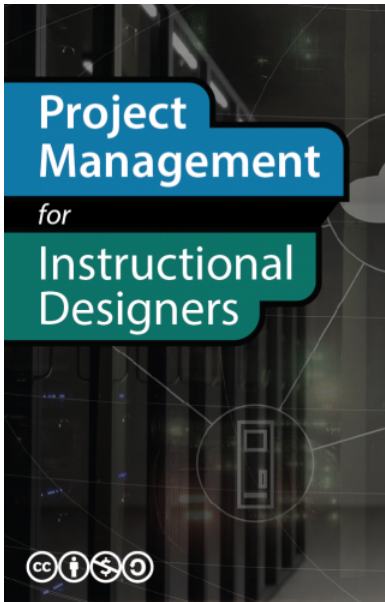
## Key Takeaways

- To identify client expectations, review written documents, but have a dialogue with the client to uncover unwritten expectations by asking questions and listening. Manage increasing expectations by reminding the client of the original objectives.
- Understand the stated corporate values by reviewing written documents and client actions related to those stated values.. Attempt to avoid conflicts of values by identifying the differences before they become problems.
- Do not take advantage of clients' mistakes, but help them meet their objectives in spite of their errors. Live your own values of fairness.

## References

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