Gathering Stakeholder Expectations: The Process

by Sophia

:≡ **WHAT'S COVERED**

In this lesson, we'll learn how to gather stakeholder expectations. This is the first step when creating a project scope. This tutorial will focus on:

1. Identifying Expectations

It's critical at this stage to understand and document the key **stakeholders' expectations**. It's the role of the project manager to coordinate the gathering of expectations. Interviews must be arranged with each stakeholder or a key representative of each stakeholder group.

Remember that stakeholders can include any of the following key personnel:

- Project manager
- Project sponsors
- Project team members
- Key decision makers
- Users or customers
- Other organizations or individuals who are impacted by the project and whose decision can affect the project scope.

📄 **TERM TO KNOW**

Stakeholder Expectations
Expectations that project stakeholders have in relation to how a project will be managed and what project deliverables should perform.

2. Documenting Expectations

The project manager can either use qualitative or quantitative methods to gather expectations. In both cases, it's their role to fully document what's been collected.

The qualitative method is achieved by interviewing stakeholders. Each stakeholder type might have different

areas of expertise or influence, so questions should be targeted to their specific area. During an interview, the project manager may not know which stakeholder expectations will shape the scope, so they should record as much detail as possible.

Qualitative questions for project sponsors may include:

- "How do you see the project deliverables impacting the organization in the following year?"
- "What critical components are necessary and which might be optional?"

You can imagine that interview questions with project team members would be much different. Potential users of the final deliverables would also be interviewed. To determine user experience, a project manager may ask, "How would you use this product in your work?"

🚩 HINT

If stakeholders would not use the product, asking this question might create incorrect expectations for the product.
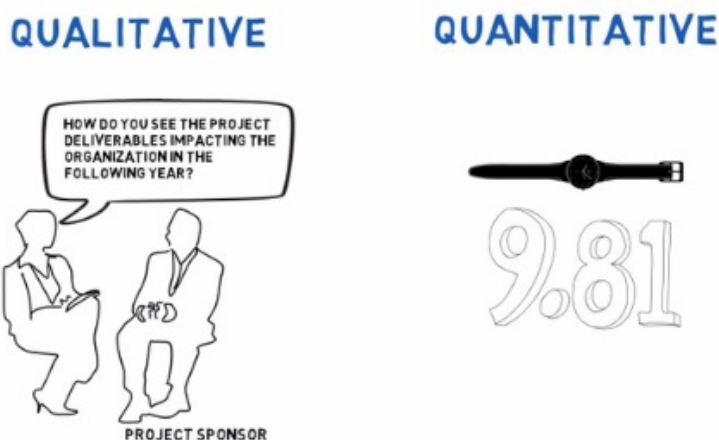
In addition to qualitative interview questions, the project manager can review data from the organization or related projects, known as a quantitative method. They may also review data about the expected outcomes or deliverables.

⚙ THINK ABOUT IT

If a project deliverable is a watch with similar functionality to a tablet computer, what quantitative step might a project manager take to gather this type of information?

Perhaps research focusing on a normal watch production might be able to provide data on design methods for a new tablet watch product since there are similarities between the two.

It's important that project managers do not underestimate the time necessary to gather all stakeholder expectations. The time may be considerable, but it's better to know expectations before work begins on a project. The longer a project runs, the more difficult it can be to adjust scope based on missed expectations.

3. Categorizing Expectations

Once expectations are gathered, the project manager must classify and categorize the information and identify key expectations. This is where conflicts may arise between stakeholders. The project manager needs to resolve these issues while maintaining strong relationships among project members.

When categorizing expectations, consider these three types.

Type of Expectation	Description	Example
Project Outcome	These relate to what stakeholders expect the project to deliver.	"The watch must be functional before worrying about its fashion."
Project Benefit	These relate how the stakeholders expect project deliverables will impact the organization.	"The watch will result in an expansion of the user base within the 10 to 20 year old demographic."
Process	These relate to how the stakeholders expect the project to be managed, how the information will be distributed, and who will approve each stage.	"The upper management requests that the project manager gives weekly updates on the status of the prototype."

Once all expectations have been gathered and categorized, the project manager begins to scope the project.

📋 **SUMMARY**

Now you understand how a project manager **gathers expectations** by identifying stakeholders and their expectations using qualitative and/or quantitative **methods**. You now know that the expectations must be documented, keeping in mind the three types of **categories of expectations**.

Source: This work is adapted from Sophia author Jeff Carroll.

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