

# Managing Expectations

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Expectations can be both a blessing and a curse! When you meet people's expectations, they're generally very grateful—a blessing. If you fail to meet those expectations, they may tell everyone about their disappointment, and be slow to offer forgiveness—a curse.

Take this example: You're considering buying some expensive goods and you meet a salesman who wants you to buy at his store. In the beginning, the salesman woos you excessively, so you decide to make the purchase with high expectations for the product and service you'll receive. Then you get the goods home and find they're defective. Believing the salesman will resolve the problem promptly and to your satisfaction, you return to the store—only to find you're now viewed as a nuisance. This encounter could easily end with hostility. The same dynamic translates into project management. A client will have expectations based upon that company's vision for the future, its commitment to the project's success, and its hopes for the implications of that success.

All too often, it seems, expectations are inflated at the outset of a relationship and dashed when the transaction's completed. If expectations are managed properly at the start, it's easier to avoid this scenario.

## What You Need to Know

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### **What are the attributes of someone who manages expectations well?**

When managing expectations, good judgment and an empathic approach is helpful. Good judgment helps you to determine what information and what promises to bring to the relationship. Empathy enables you to sense how your customer or client is feeling about your progress and gives you the means of engaging further. Honesty is also an essential. It is no good pretending that you can do more than you can or deny significant problems.

### **I have been given demanding targets and I don't think I'm going to be able to reach them. What can I do to convey this without looking like a failure?**

It is important to get your concerns into an early discussion. You can do this while managing expectations positively. By demonstrating you have thought things through properly and that you have the information to back up your concerns, you will retain your credibility. More than this, if you proactively suggest ways forward that will get you closer to your targets and/or show that you can

reach them in the longer term, you will succeed in demonstrating that you have things under control and avoid looking like a failure.

### **Unfortunately, as a result of previous poor performance, my clients expect me to fail! What can I do to get them to have faith in me?**

As long as you can get them to let you try, you are in a stronger position than some. Convince them to put their trust in you and agree on targets that are less bullish than you think you can achieve but above their former experience. When you reach these targets easily, you can raise their expectations a notch. Make sure you draw attention to your successes—but not too obviously!

### **I have a complex project to run and I'm concerned that I won't be able to manage my client's expectations realistically. What should I do?**

You need to plan carefully, ensuring that you have incorporated all the assumptions and scenarios that may derail the project before completion. (There are many project management packages on the market.) Review these with your client so that she knows you have taken every step to manage the complexity as accurately as possible. Ask for her input at an early stage and ask her to challenge your thinking. Not only will this reduce the chance of error but it will help set your client's expectations and build trust in your professionalism.

### **I have Key Performance Indicators against which I am appraised and rewarded. How do I reconcile my drivers with those of my clients or customers?**

You need to think of win-win strategies so that when you meet your clients' or customers' needs, they are also meeting yours. Perhaps you could set these up at the outset by sharing some of your targets with them. You may be able to negotiate a phased project or payment plan that demonstrates you are meeting your own KPIs while also, meeting (or exceeding) the needs of your clients or customers.

## **What to Do**

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In this "What to Do" section, we cover how you set expectations, how you keep aligned to others' expectations, and how you demonstrate that you have met expectations. In doing this, we make the

assumption that you are entering this topic for the first time. We may, therefore, make statements that you feel are obvious. It is not our intention to be patronizing; only to make sure you have the information you need in order to know “What to Do!”

This opening paragraph is an example of managing expectations!

Managing expectations is a key competence for anyone who is in a relationship of any sort. This includes clients, customers, colleagues, and members of your team. Unfortunately, the expectations of either party may not be explicit. They are often assumed or deduced from observing someone in action; whether they are attending to their work, in a meeting, or in a social setting.

So what are expectations? Broadly, expectations are someone’s “fantasy” of what the future will look like, and it is these expectations that will determine whether you are successful or not.

It is relatively easy to build someone’s expectations because they *want* the future to be rosy and problem free. It is quite another matter to build these expectations accurately. In managing expectations, it is important to outline the future sufficiently accurately at the outset to be confident that the expected outcome and the actual outcome will be aligned. Fudging the future to make it look more attractive than it is likely to be is not the objective. Nor is painting a bleak picture so that whatever the outcome, expectations will be met or exceeded. Managing expectations requires an honest appraisal of the future possibilities, including any potential stumbling blocks that may have to be overcome along the way, so that the excesses and deficits can be accommodated without damaging the relationship.

## Set Clear Expectations

Setting expectations is not a one way communication. In order to set expectations clearly, you need to be sure that the person whose expectations you are managing has heard and accepted your view of the future. You can only know this by getting them to confirm and articulate their understanding. Ask them how they would describe the future situation using their own words. You might also want to ask them what their **assumptions** are, as these are often unspoken factors that create expectations. Once this communication is taking place, it is possible to **ask questions** that clarify and **build mutual understanding**. Sometimes “What if?” questions drive meaning into the conversation. Make sure that you are listening to your counterpart’s responses properly. We often “listen against” people because our own view of the world is so strong, we are unable to imagine a different one! So, engage in **active listening** and tie down all the loose ends that could lead to a misunderstanding or cross-communication.

## Stay Aligned to the Expectations

Once you have set expectations satisfactorily, you would be wise to make sure you keep close to them. Sometimes, expectations take on a life of their own and turn and twist out of agreement without

your being aware of it. For instance, others may share their stories and introduce new expectations that if not met, will result in disappointment. These stories may equally well be negative and sabotage the expectations that you have been managing so carefully.

To keep everything on track, use **milestones**, **timelines** and **concrete measures** to enable you to reconnect at regular intervals with the person you are working with. If you have agreed the metrics that will determine you are meeting your side of the bargain progressively or that you have delivered on your agreement, there will be no argument. However, if you leave the concrete measures out of the conversation at the outset you will have no touchstone that will provide the evidence of your efficiency and effectiveness.

## Make Your Successes Known along the Way

If you are managing expectations, you need to demonstrate when these have been met. This means *making your successes explicit* as you progress along your agreed timeline. Use your successes to trigger a communication. "I thought you'd be interested that we have completed the first stage of the project on time." You might then go on to tell the story of how you did it and how you overcame any problems in doing so. This will give you an opportunity to adjust expectations about the next phase of the project or transaction if you need to. Ask if anything new has emerged for your client or customer in the meantime that you need to fold into the next stage.

It may be worth remembering that sometimes, it is not your customer or client that has unreasonable expectations, but you! If you find yourself at an impasse, seek out a trusted adviser who can help you diagnose what is going on and challenge your own assumptions about the situation. If you can see things differently and make a small conciliatory move, it can change things suddenly and significantly and leave you free to get on with your job.

## What to Avoid

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### You Fail to Make Assumptions Explicit

Because we are so familiar with our own values and beliefs, we often forget that others may have a different view of the world. It is important to make your assumptions explicit when setting and managing expectations—and ask your counterpart to make his or hers explicit too. In this way, you can create an opportunity for a meeting of the minds rather than risk missing each other altogether!

## **You Set Expectations Too Low**

In order to “delight the customer” we may attempt to set the expectations low. In this way, when we meet them, we necessarily exceed our customer’s expectations and, we reason, delight him or her in doing so. However, this can backfire as our customer may feel that we do not have the ambition or confidence to meet his or her needs. Therefore it is best to be honest and realistic when setting expectations.

## **You Fail to Ask for Feedback**

Sometimes we forget that our clients or customers are looking at our achievements from a different perspective. What we think are successes, they may view as disappointments. Try to keep your communication flowing so that you can regularly get their views. Ask for feedback and seek out any concerns that they may have. Ask how things look from their vantage point and what else you might do to help them meet their objectives. You will then have a better chance of becoming a close ally.

## **You Fail to Do What You Say**

It is well known that perceptions are formed within seconds and are very difficult to change once they have been formed. Be conscious therefore of all the communication channels you are using and make sure that your actions and words do not conflict with your rhetoric. This means honoring promises, ensuring you meet deadlines, and demonstrating that you have your client’s or customer’s best interests at heart—as, no doubt, you say you do! Put yourself in his or her shoes and ask yourself what it would be like to be in partnership with you.

## **Where to Learn More**

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### **Books:**

Karten, Naomi, *Managing Expectations*. Dorset House Publishing Company, 1994.

Karten, Naomi, *Communication Gaps and How to Close Them*. Dorset House Publishing Company, 2002.

Athmo, *Managing Expectations & Comparisons: A Guide to Go Beyond Stress*. Moksha Publications, 2005.

Gentle, Michael, *The CRM Project Management Handbook: Building Realistic Expectations and Managing Risk*. Kogan Page, 2002.

Peppers, Don, and Martha Rogers, *Managing Customer Relationships: A Strategic Framework*. John Wiley & Sons Incorporated, 2004.

Wheeler, Joe, and Shaun Smith, *Managing the Customer Experience: Turning Customers into Advocates*. Financial Times Prentice Hall, 2002.

## Web Sites:

Consulting Academy: <http://consultingacademy.com/a08.shtm>

The Mind Gym: [www.themindgym.com/b/index.php?pageID=223&id=50](http://www.themindgym.com/b/index.php?pageID=223&id=50)

STC Society for Technical Communication:  
[www.stc.org/confproceed/2001/PDFs/STC48-000163.PDF](http://www.stc.org/confproceed/2001/PDFs/STC48-000163.PDF)

TechRepublic: [http://articles.techrepublic.com.com/5100-10878\\_11-6061908.html](http://articles.techrepublic.com.com/5100-10878_11-6061908.html)

Free Management Library: [www.managementhelp.org/plan\\_dec/project/project.htm](http://www.managementhelp.org/plan_dec/project/project.htm)