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Meeting expectations

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[ARTICLE Requirements Management, Business Analysis, Stakeholder Engagement June 2003](#)

PM Network

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How to cite this article:

Powell, J. W. (2003). Meeting expectations. *PM Network*, 17(6), 56–60.

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In addition to clarifying requirements, the facilitated workshop helps achieve customer buy-in and focus on project schedule, constraints and risks.

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There are two extremes in requirements gathering: “all” or “nothing.” In the “all” approach, the detailed requirements are not subject to interpretation. If you don't comply with the specs, you don't get the order, plain and simple.

In the real world, the practice of validating customer requirements is too often skipped, and the project team starts with little or “nothing.” What's more, if the customer requirements are ill-defined or the customer leaves without a clear sense of deliverables, the project manager risks almost certain failure.

Of course, there are possibilities between all and nothing, but the bottom line is that requirements gathering must be collaborative. Customers must outline desires in clear, specific terms, whether working from outlines to full statements of work, and project managers should help customers clarify expectations.

In the simplest form, this exploratory work may be question-and-answer dialogs that clarify specifications. In its most complex and beneficial form, requirements gathering occurs as a facilitated workshop, in which the project manager details and validates requirements with stakeholders (Figure 1).

Figure 1. Shown is a requirements support matrix. In the “all” approach, you have a best-case scenario, such as military specifications. In the “nothing” approach, you have the worst-case scenario, such as when customer requirements are unclear and the project manager skips due diligence or requirements validation.

Although the time and expense of this type of workshop makes it prohibitive—and unnecessary—for smaller projects with a well-defined scope, project managers on larger, complex efforts will find the benefits outweigh the risks. With the appropriate tools, preparation and rules, the facilitated workshop can ensure success for complex services engagements.

Top Side

A facilitator must help ensure the workshop sessions are attended by the right audience. For example, the U.S. Department of Agriculture (USDA) held a 2.5-week facilitated workshop for 38 people spanning five different companies and three customer organizations. The participants consisted of customer and project manager support, including the information technology (IT) implementation services contractor, the Operations & Maintenance (O&M) contractor, as well as the program management office (PMO) contractor. The workshops offered opportunities to clear the air between all parties and get everyone aligned and focused before starting a multimillion-dollar electronic procurement (e-procurement) implementation.

In this situation, representation from across work streams (implementation, technology, PMO and O&M) and functional representation within each work stream (help desk, communications, change management and training) were required. An executive with the authority to make decisions also must attend to ensure that technical requirements reflect executive priorities and strategic direction.

When you're preparing for your workshop, don't forget to reference your company's lessons learned. Execution templates should include rules of conduct, both facilitator-specific (like remaining objective and focusing on issues and not personalities to break logjams) and for the workshop in general (such as stopwatch usage to keep response times within limits).

Execution Matters

The workshop should enhance consensus building and validate the group's strategy for adhering to customer requirements and goals.

With so many participants with so many (often diverging) interests, the USDA workshop required firm ground rules to produce a project plan and deliverable definitions. Everyone could provide input during the free-form sessions, but all input was limited to two minutes.

The meeting facilitator used sticky notes to “storyboard” on the walls of the room and a laptop with project management software to build and display the real-time project plan as agreement was reached. Rules and tools notwithstanding, the most important success factor to the workshop was the customer program manager. As a primary stakeholder and the one with ultimate decision-making authority in the group, she kept the momentum going.

In the End

At the close of the workshop, you should distribute written briefings to participants and key stakeholders. Also, you can double-check to ensure goals were met, action items were assigned and closed as applicable, lessons learned were captured and next steps were covered. In the USDA instance, senior personnel at each of the agencies participating in the initial engagement phases were personally briefed on workshop outcomes and attendant impacts specific to their organizations.

The workshop process doesn't necessarily conclude with the last session (Figure 2). Just as consensus building offers feedback to the “execute” portion of the workshop, the entire process itself could feed a new workshop, such as different sessions occurring at multiple management levels.

The cost of facilitated sessions can be substantial. In addition to facilities and facilitators fees, the participant will be distracted from primary job functions. The USDA facilitated workshops preceded a high-visibility major project that involved significant cost (tens of millions) and organizational change over multiple years. The potential benefits of the session were well worth the necessary costs.

Too Many Deliverables

Customer workshops also bear associated risks. While synergy and brainstorming are good, consensus may not always be in the best interest of the customer or project manager. In the USDA example, far too many items were deemed as “deliverables”—even the “contact list.” Designating too many deliverables increases the number of documents required.

In this case, the deliverables were due too quickly and specified unnecessary work, another result of workshop consensus. For example, draft training materials had to be created, submitted and approved by the customer. According to the project plan, updated training materials were to be submitted four weeks later, incorporating the feedback of a customer question-and-answer session. However, after receiving an official grade from the customer, the project manager had one week to respond to any comments and try to improve the grade with a final submission of the deliverable (if necessary).

Figure 2. This flow chart details the major steps of a facilitated workshop.

Due to the immense administrative burden imposed by the aggressive deliverable schedule, deliverable reviews were delayed. In this case, the project manager received the initial draft training materials grade one week later than expected. In the end, revised draft training materials and updated training materials were submitted within one week of each other, without unnecessarily churning precious project resources. Proper planning would have identified this potential problem from the outset.

Peer recognition events provide additional opportunities to reach consensus during the closing moments of successful workshops.

Consensus also generated too many milestones. On such a complex and high-visibility project, diluting the importance of meaningful milestones with gates of secondary importance hurt the project and the team. Submission of updated training materials was made a milestone when there were already several necessary training milestones (start/finish of training and of training quality assurance).

Facilitated workshops also may alienate the customer or cause rancor among the staff. Contending views are healthy; ideas must be challenged and worked through fully to yield well-thought-out results that benefit the group. However, speaking openly should not take the form of a personal attack. You must stay objective, ensuring all parties adhere to the rules and restore focus when sessions spin out of control. Expect some workshop participants to walk away from the sessions without being pleased.

Because leadership from key stakeholders/ultimate decision-makers is so vital, you must manage their disposition on a special basis. Therefore, while clarity of purpose and focus is important, your primary objective is to ensure

customer satisfaction while guiding a workshop that produces meaningful results. **PM**

Jonathan W. Powell, PMP, is a certified e-business (J2EE) solution designer and project manager who has successfully managed numerous projects in the toughest of environments, including a nuclear refueling overhaul.

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PM NETWORK | JUNE 2003 | www.pmi.org