

# Re-aligning Project Objectives and Stakeholders' Expectations in a Project Behind Schedule

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**PMI**  
Global Congress  
NORTH AMERICA 2008

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# Outline of Session

## Introduction

1. Project situation
2. Objective of simulation

## Workshop Simulation

3. Purpose of workshop
4. Workshop set-up and parts
5. Workshop simulation

## Conclusion

6. Workshop outcomes and take-aways
7. Lessons learned from other workshops
8. Q & A



# Project Situation (1/2)

**Project objective:** Replace the proprietary call center and promotion management applications with a new CRM (customer relationship management) system

**Project objectives** agreed by CEO and every department head

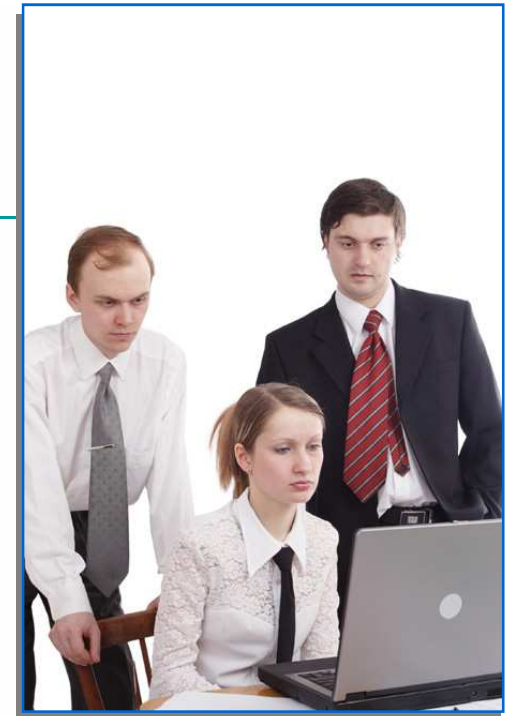
**Project duration:** 9 months

**Atmosphere:** good, high motivation

**Today, 2 months later**

- 😊 Key requirements of the marketing department have been captured and documented
- ☹️ Call Center and the Billing departments have not concluded documenting their requirements due to different opinions about the scope and level of project involvement of their subject matter experts

**=> Project is behind schedule and not in budget**



# Project Situation (2/2)

## Resolution:

- New full-time project manager replaces part-time project manager
- Project manager reporting directly to project sponsor

**Mission:** Do whatever is necessary to get project back on track and finish it on time and in budget

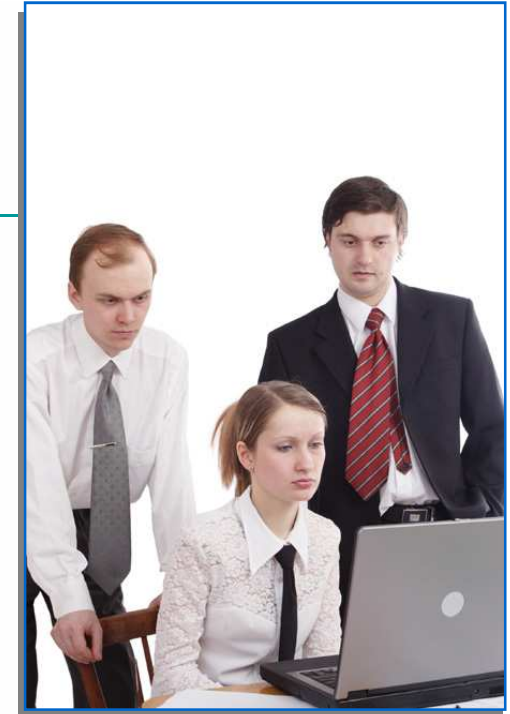
**First activity:** Interviewing department chairs

**Insights after interviews:** No common understanding of the project objectives

**Next action:** Invitation to project alignment workshop

## KEY QUESTION:

Can this workshop become the foundation of project success and if so, how?



# Objectives of Simulation



## The simulation will

- sketch a simple, yet powerful approach to realign project objectives and stakeholders' expectations,
- outline proven workshop approach,
- describe the prerequisites and necessary preparation activities,
- delineate the key parts of the workshop,
- and sketch possible outcomes.



**With your help and *active participation*\***

# Purpose of Workshop

## Objectives

1. Get a mutual understanding of each other's expectations about the project
2. Revisit the official project objectives statement and
3. align it with
  - a) the present situation and
  - b) stated expectations of attendants

## Expected Outcomes

1. Refined project objective statement which is SMART (specific, measurable, achievable, relevant, time-boxed)
2. Objective statement mutually understood and supported



# Workshop Setup & Parts

**Workshop attendants:** All affected department chairs\*, sponsor, business and technical track leaders of the project team

**Workshop duration:** 3+ hours.

**Simulation duration:** 40 minutes

## Part I: Introduction & Breakouts

- Introduction
- Breakouts (5 groups of 2-3 individuals each, everyone has decision making authority)
  - Discuss and summarize their needs and expectations of the project and its deliverables
  - Prepared set of questions serve as guideline
- Presentation and discussion of results in whole group

## Part II: Prioritization

Prioritizing presented breakout results - based on SMART and other pre-defined prioritization criteria

### Objectives:

- Qualify the existing project objectives
- Align with stakeholders' expectations
- Meet previously set criteria

## Part III: Conclusion

- Summary of findings
- Review of remaining open questions
- Outlook of next steps

# Part I: Breakouts



## Instructions:

### 1. Answer the following questions\*

- a) **Purpose:** Why do you and your organization need a new CRM system? - List *the* most important reason.
- b) **Value:** On a scale from 1 (low) to 5 (high), what priority does the new CRM system have for you and your organization?
- c) **Other projects:** What other project(s) is (are) more important to you and why? On a scale of 1 to 5, what priorities do they have? List up to 2 other projects.
- d) **Impact of delay:** What impact does it have to you and your organization if the project is delayed and/or does not meet your expectations (e.g., limited scope)? How do you measure, i.e., quantify this impact? - List the 2 most important impacts and quantify them.
- e) **Fallback plan:** Do you have a fallback plan / solution in place if the project fails? How much would it cost? – Limit your response to 2 options and quantify them.
- f) **SMART project objective(s):** Based on your answers above, phrase the project objective(s), making sure that it is a) **specific**, b) **measurable**, c) **achievable**, d) **relevant** and e) **time-boxed**.
- g) **Critical success factors:** What are the top 2 most important factors that have to be met for the project to be successful?

### 2. Print each answer on a separate moderation card (e.g. 4x5 inch card)

### 3. Appoint one member to **present results to whole group**. Presentation limit for simulation: 2 minutes

# Part II: Prioritization

## Voting Rules

- Every participant has 3 votes for various categories
- Votes can be split evenly or allocated to one or more entries

Top entry of each category discussed in group

Objective: agree on a single entry which everyone or at least the majority can support

In case of tie:  
sponsor decides

## Prioritization

## Voting & Discussion Sequence

- (1) Categories *Purpose, Other Projects and Impact of Delay*
- (2) Collected *SMART Project Objectives*
- (3) *Critical Success Factors*

# Part III: Summary of Results

- ✓ Summary of prioritized project objectives and stakeholders' expectations
- ✓ Revisit open issues and/or action items -> assign owners, define due dates
- ✓ Determine next steps getting project back on track.

Possibly

- Establish functional and non-functional requirements
- Review the project governance structure
- Adjust the project plan to meet the qualified and re-aligned project objectives and stakeholders' expectations



# Workshop Outcomes & Take Aways

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- ✓ Common definition and understanding of the project objectives = critical to get project back on track and foundation for all consecutive project work
- ✓ Prioritization guidelines for operational project work
- ✓ Simple and effective team building exercise
- ✓ Constructs a learning environment => promotes mutual understanding of all parties involved

☞ **Still:** Workshop alone is NOT sufficient to re-align the project objectives and stakeholders' expectations

☞ **Instead:** Workshop and outcomes help build a solid foundation to get the project back on track

# Lessons Learned From Other Workshops



## Workshop approach applicable to many situations

- Minimum duration of workshop: 2-3 hours.  
Longer = better (the more complex the longer)
- Maximum number of attendees: 20
- All key stakeholders attend; all have decision making authority
- Experienced facilitator
- Prior stakeholder interviews -> build trust and understanding
- Thorough preparation and team support
- Last but not least, every workshop has its own dynamics

# Q & A

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☞ Available for additional Q&A after workshop session

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