

## ***Positive Leadership in Project Management***<sup>1</sup>

### **The Art of Managing Expectations**<sup>2</sup>

By Frank Saladis, PMP, PMI Fellow

I have been writing articles about “Positive Leadership in Project Management” for several years. The reason for choosing this particular title as the main theme for each article is directly connected to my belief that project managers, when assigned to a project, are assuming a position of leadership regardless of project size. A positive, motivational, and inspiring attitude is essential for personal success and the success of the team and the project. Leadership is about creating change, taking risks, setting an example, helping others to succeed, and having the courage to keep trying when previous attempts did not work. Leadership is about filling people with a sense of confidence, pride, and determination to achieve goals. It is also about preparing people to be resilient during difficult times, taking the edge off in times of great stress, and providing followers with a sense of purpose and a belief that they can succeed in reaching their goals. Leaders help others define success and provide guidance and mentorship to improve the probability of a successful outcome. Success is, in part, achieved when a set of goals and objectives have been clearly stated and the team understands and strives to meet those goals

Leadership, if you really think about it, begins with the development of a set of clear expectations. Unfortunately, in many cases, expectations are set very informally and are not clearly articulated. Sometimes they are set in a very aggressive manner and can be viewed as dictatorial and overbearing. When a new leader is assigned to a position, it is very common to either experience or observe some type of dialog among employees, and sometimes among other managers, about the incoming leader and what to expect. Much of this dialog is based on hearsay, rumors and unsubstantiated information. Assumptions are formed, judgments are made and plans for dealing with the new leader are often created before the leader’s position actually becomes official or the new leader has communicated his or her plans. These assumptions may lead to an uncomfortable environment for communication and could cause some serious issues in the areas of morale and productivity. The newly assigned leader, upon some observation of the organization he or she is joining, may begin to set some expectations regarding organizational or specific individual performance without actually observing behaviors and performance or conducting any formal discussions with other leaders or employees. This lack of dialog, open

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<sup>1</sup>This article is one in a series on Positive Leadership in Project Management by Frank Saladis, PMP, PMI Fellow, popular speaker and author of books on leadership in project management published by Wiley and IIL in the United States. Frank is widely known as the originator of the International Project Management Day, the annual celebrations and educational events conducted each November by PMI members, chapters and organizations around the world. Learn more in his profile at the end of this article.

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communication and setting of “spontaneous expectations” may lead to a serious breakdown in many performance areas and create conflict that could have been avoided.

Truly effective leaders understand that setting expectations intentionally is one of the key factors associated with organizational success. By “intentionally” I mean the leader schedules a specific session with an individual or a team of representatives from a business entity to discuss issues, concerns, visions, ideas, and ultimately a set of expectations. It is also very important to understand that expectations are different from goals and objectives.

Goals relate to vision, aspirations and a desired state. Organizations have goals such as becoming the consumer’s number one choice for products and services or best in class for a certain product or service.

Objectives are the stepping stones to achieving goals.

Most project managers are familiar with the term “SMART” objectives:

**Specific** – Clearly stated, detailed, focused

**Measurable** – Can be tracked and measured as in quantity, numerical data or comparative analysis

**Achievable** – Feasible and actionable. Can be accomplished by the person or team assigned

**Realistic** – Are meaningful and are not beyond the capabilities of the individual or team and will produce a useful or value adding result

**Time based** – Will be accomplished within a reasonable and agreed upon date.

Objectives answer the What? Who? When? Why? How? And Where? Questions. We need objectives to set direction and to make sure employees and teams know what they must accomplish.

Expectations are associated with objectives but have several differences. Expectations are more like agreements between people about how to proceed with an assignment, how reviews will be conducted during the execution of an assignment, how communication will be managed, the level of quality necessary, timeliness of status, reliability, and how changes will be managed.

As an example, a leader or manager may set the following expectation: “During this assignment I expect you to contact me immediately following a report of any safety violation” or “I expect you to keep me informed of major changes the customer may request.” I expect you to inform me if there may be a delay in completing an assignment.

Expectations are set in many ways. They can be communicated and established by what is said or not said, what someone else may have said, or an action or inaction.

To set an expectation clearly and effectively, consider the following questions:

- What am I expecting from the team or the individual?

- What do I know about the capabilities and skills of the team or the individual?
- What is this expectation important to me regarding the assigned work or project? How important is timeliness? How important is format? How important is quality and ascetics?
- How well does the assigned individual know the process?
- How familiar is the individual with organizational polices?
- What is expected of me?
- How can I make sure that my expectations are clearly stated and understood?
- What does the individual need from me to ensure that the assignment is successful?

### **Why setting expectations is important**

The next time you have a conversation with a colleague about a dissatisfied client or manager or other business associate, you will probably hear someone say “you didn’t manage their expectations.” Think about that statement. There is probably quite a bit of truth in those 5 words. If we use a familiar technique known as root cause analysis, we can easily determine that many problems are created as a result of the lack of clearly defined and explained expectations.

Think about a situation in which your expectations were not fully met. Then ask yourself why the expectation was not met. Did you actually explain what it was that you were expecting? Did you clearly articulate your expectations to the team or the individual?

It is likely that you didn’t communicate your expectations at all, or were not very clear when you were explaining what you wanted.

Think of the process of setting clear expectations as a form of prevention. (It could be considered a form of “people risk management”). Think about it from this perspective – What if I am not clear about my expectations regard the safety of my team during project execution? If I am not clear about the expectations associated with the quality of a deliverable, there could be many hours of rework and significant additional cost.

It is the leader’s role to create a vision, set direction, and inspire followers. It is also the responsibility of the leader to establish a work environment where people know what is expected of them and that they can expect to be treated fairly and with respect. Expectations involve both sides and require serious effort to develop them, communicate them and follow through on them. The results of well communicated and managed expectations benefit everyone and can make a significant difference in the overall performance of an organization and can have a very positive impact on organizational culture.

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## About the Author



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**Frank P. Saladis**, PMP, PMI Fellow is the Owner/Founder of Blue Marble Enterprises Inc. and Project Imaginers. Frank is an accomplished leader and contributor in the discipline of project management. He is the author of 12 published books, the past editor of the All PM Newsletter and the author of over 160 project management articles. Frank provides training and consulting internationally and has educated and entertained countless audiences with a special blend of project management knowledge and tasteful humor. He is also an experienced and well-known project management instructor and consultant and a member of the PMI® Seminars World team of trainers. Mr. Saladis' 35 year career includes 28.5 years with AT&T, 3 years with Cisco Systems, and more than 25 years as a professional trainer, facilitator, mentor and keynote speaker.

Frank is the Originator/Founder of International Project Management Day which launched in 2004 and has been growing in recognition yearly. The goal of International Project Management Day is the worldwide recognition of the many project managers and project teams in every industry including nonprofit organizations and health care who contribute their time, energy, creativity, innovation, and countless hours to deliver products, services, facilities, and provide emergency and disaster recovery services in every city and community around the world.

Frank was PMI's 2006 Person of the Year. Frank is a Project Management Professional, a graduate from the PMI Leadership Institute Master's class, and has contributed significantly to the organization's growth and knowledge base for more than 20 years. His leadership activity within PMI included the position of President of the New York City PMI chapter from 1991-2001, President of the Assembly of Chapter Presidents, and Chair of the Education and Training Specific Interest Group. He received the high honor of the "PMI Fellow Award" in October 2013 and received the very prestigious "PMI Distinguished Contribution Award" in October 2015.

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