

PROJECT MANAGEMENT TRAINING SCENARIO
MANAGING STAKEHOLDER EXPECTATIONS: 2

KEY CHARACTER 1

STAKEHOLDER: F. JAMBOWIE (*difficult stakeholder, irate, feels undermined*)

SCENARIO OVERVIEW

You are the VP, Customer Service–Overseas at your company. Currently customer service is handled at 4 locations, 3 in the United States and 1 recently up and running location overseas, resulting from your company’s merger with another company. This fourth location overseas is servicing non-English speaking customers, a new market expansion for your company.

Your company has chartered and initiated a project which will create a deliverable that will impact all Customer Service operations across all locations. You have the following concerns about the fourth location specifically.

YOUR MAJOR CONCERNS AS STAKEHOLDER

- Following the merger, it was discovered that the new Customer Service location overseas was already setup with the same customer service systems that other US locations used; the only difference being that the system was customized in the non-English language. This made the implementation of customer service operations in the fourth location for the non-English speaking customers much easier.
- So far however, you have not been brought into or made aware of any plans for similar customizations of your company’s newly chartered and initiated project deliverable. It was therefore a big surprise to you during the last weekly meeting when your boss, GM-Site Operations, Overseas, asked you for an update on customization efforts and what had been finalized regarding associated budget issues.
- This was the first you had heard of this. Apparently, the project manager for your company’s newly chartered and initiated project had contacted the GM last week to get a cost center number for hiring a technical language translator for the new project deliverable. Not knowing any project details yet, you were embarrassed and unprepared to answer the GM’s questions. You were annoyed that you had been bypassed and not kept in the loop on such pertinent issues concerning your business unit.
- During this weekly meeting with your boss, GM-Site Operations, Overseas, you also found out that the regional IT team in the fourth location will be laid-off in 2 weeks due to centralization of IT services to 1 location in the United States. Since this is the team that developed the original system customizations, you recommended a stop to lay-off plans while you found out more about the project. You would hate to lose such valuable IT expertise and support, which you will likely need.

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TO BE ACTED IN THIS SCENARIO

- Following the meeting with GM, you call the project manager on the phone and express some harsh words, communicating complete dissatisfaction for PM's handling of project activities related to your business unit. Highlight issues described above.
 - You demand a meeting immediately to bring you up to speed as well as daily status reports on the project and the inclusion of the regional IT Team in all discussions going forward.
 - You also communicated that you have absolutely no intention of applying the cost for a technical language translator to your cost center and fully expect the project budget to cover it. In addition, you bargained with the GM to keep the regional IT Team on the condition that their salaries will be covered by the project budget.
 - You communicate this requirement to the PM, demanding an updated project summary budget sheet sent to you by close of business tomorrow.
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PROJECT MANAGEMENT TRAINING SCENARIO

MANAGING STAKEHOLDER EXPECTATIONS: 2

KEY CHARACTER 2

PROJECT MANAGER: N. MOSS (*Project Manager*)

SCENARIO OVERVIEW

You are a senior project manager on a high-visibility project to customize your company's customer management system (CMS). Very recently, there was an acquisition which resulted in the addition of a fourth location for customer service operations.

Early in the project you went through stakeholder identification however it appears that a major stakeholder (F. Jambowie) was omitted from all project communication thus far. As a project manager it is your responsibility to furnish all stakeholders with relevant information and liaise with them to get buy-in and support. Right now the opposite is the case on your project due to a number of concerns which F. Jambowie will further clarify. Some of the concerns causing this stakeholder to feel irate, displeased and undermined are as follows:

- So far, the stakeholder has not been brought into or made aware of any plans for software customizations of your company's newly chartered and initiated project deliverable even though the stakeholder's team is directly involved.
- When asked for updates from senior management, the VP was blank and unaware.
- The stakeholder is annoyed and feels bypassed and not kept in the loop on such pertinent issues concerning your business unit.
- The team that developed the original system customizations is about to be laid off. This team was not considered in the big-picture view of the project.

TO BE ACTED IN THIS SCENARIO

You have a 5 minute meeting with the stakeholder in the next 5 minutes.

MEETING END GOALS

- Address stakeholder's concerns to manage the stakeholder's expectations and gain buy-in.
- Remember to dialog with the stakeholder bearing in mind this is a stakeholder with a high level of influence and moreover resources who will ultimately use the deliverable.
- Accord the stakeholder his/her desired level of recognition and respect.
- Demonstrate how you can handle this in a manner consistent with your professional responsibilities as project manager. Make the stakeholder feel valued and recognized.