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SOLUTIONS

PMP ECO

LESSON 03

STAKEHOLDERS, VISION, AND COMMUNICATION



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LESSON INTRODUCTION

In this lesson, we will explore the following tasks, as outlined in the Project Management Professional (PMP)® Certification Exam Content Outline :

01	Engage stakeholders	ECO 1.4
02	Develop a common vision	ECO 1.1
03	Plan and manage communication	ECO 1.8
04	Align stakeholders	ECO 1.5
05	Manage stakeholder expectations	ECO 1.6



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IDENTIFYING & UNDERSTANDING STAKEHOLDERS

PMP ECO Task 1.4

Identify the people and groups who can influence, impact, or be impacted by the project — and understand what matters to them.



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IDENTIFYING STAKEHOLDERS

PMP ECO 1.4.1

Understand who can influence, impact, or be impacted by the project.

Key focus:

- Identify stakeholders early.
- Understand their interests, influence, involvement, and interdependencies.
- Continue identifying stakeholders as the project evolves.



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TYPICAL PROJECT STAKEHOLDERS



STAKEHOLDER

An individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a portfolio, program, or project.



Can you categorize these stakeholders?

- Which are typically project team members?
- Which are not?
- Which are typically active in project work?

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STAKEHOLDER IDENTIFICATION



01

Who are they?

Check the business case and benefits management plan for names.

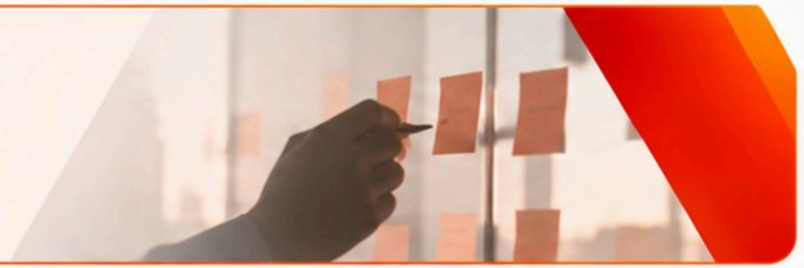
02

Look for additional stakeholders

Later, check the issue/impediments log, change log, or requirements documents to see who else is needed or named.

What's their relationship to the project?

Identify impact on project and engage success early to avoid surprises later in the stakeholders project!



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STAKEHOLDER AND COMMUNICATIONS MANAGEMENT: OVERVIEW



01 **Stakeholder identification**

02 **Stakeholder register**

03 **Assessment grids/matrices/models**

04 **Stakeholder engagement plan**

05 **Communications management plan**

06 **Stakeholder engagement assessment matrix**

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ANALYZING STAKEHOLDERS

PMP ECO 1.4.2

Analyze stakeholder characteristics, expectations, influence, and engagement needs so that project communication and engagement can be tailored appropriately.



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ASSESSING STAKEHOLDERS



STAKEHOLDER ANALYSIS

A technique of systematically gathering and analyzing quantitative and qualitative information to determine whose interests should be considered throughout the project.

01 Data Gathering

- Questionnaires and surveys
- Brainstorming
- Document analysis

02 Data Representation

- Two-dimensional (2D) grids
- Power/interest
- Power/influence
- Three-dimensional (3D) grid—Stakeholder “cube”

03 Data Analysis

- Impact/influence
- Stakeholder analysis
- Salience model
- Directions of influence

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CREATING THE STAKEHOLDER REGISTER



STAKEHOLDER REGISTER

A project document that contains information about project stakeholders, including an assessment and classification of project stakeholders.

01 **Capture and record** important stakeholder information.

02 **Factor in organizational process assets (OPAs).**

03 **Update it!** Describe the evolving relationships with stakeholders throughout the project.

04 **Contains the information** necessary to execute the stakeholder engagement plan.

05 **Refer to stakeholder registers** from previous, similar projects for help.

06 **Remember this is a public document,** so help make sure the information presented is appropriate.

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STAKEHOLDER REGISTER



Use a **stakeholder register** table with **these** fields:

	Name	Title	Internal/ External	Project Role	Major Requirements	Expectations	Influence/ Attitude
1	Eugene Lowe	CEO	Internal	Sponsor	Successful completion	On-time completion; successful partnerships	Leading
2	Oasestown Municipality	—	External	Government partner/liaison; funding contributor; SLC site owner	Successful facility completion and partnership	Accountability	Supportive
3	Kara Black	Principal, Oases Architects	External	Partner/designer/conservation specialist	Clear design brief; successful partnership	Fluid funding and communication; design autonomy	Leading
4	Josie Bynoe	Chair, Board of Directors	Internal	Direct strategic local partnerships for Shawpe Industries	Environmental sustainability; “moral rights”	No damage to Oasestown conservation district/environment	Resistant
5	Helen Grey	Lead, Business Development	Internal	Product owner	High-profile tenants; strong community and conservation credentials	Organizational learning; leadership opportunity	Neutral
6	Hasan Persaud	VP Business Development	Internal	Portfolio owner	Capacity for ongoing revenue	End-user in Phase 3	Neutral
7	Mandeep Chahal	VP Finance	Internal	Budget controller	Direct contact with funding partners	Clear data	Neutral
8	Kei Leung	VP Marketing	Internal	Marketing expert	Elevation of brand	High-quality tenants	Supportive
9	Tenants	—	External	Income source	Bespoke spaces	High quality	Neutral
10	Contractors	—	External	Building vendors	Clear instructions; contract	—	Neutral
11	Oasestown local residents	—	External	Residents near the project	Traffic and noise pollution management	No inconveniences	Resistant
12	Oasestown Community Partnership	—	External	Community group	None	Free space in the Shawpe Lifestyle Center	Leading

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KNOWING YOUR STAKEHOLDERS



Look Beyond Job Titles

Don't just focus on job titles. Consider their actual role, interests, and how they can impact the project.

Power

Level of authority.

Interest

Level of concern about project outcomes.

Influence

Ability to influence project outcomes or cause changes to planning or executing (attitude or impact).

Potential Impact

Magnitude of potential contribution or disruption to project.

Since this is a public document, it may be wise not to name stakeholders by name—particularly when they are resistant. **Use numbers rather than names.**

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STAKEHOLDER PERCEPTIONS

Must be holistically understood in **customer-centric project management** approaches.

Can affect project success, whether positive or negative.

Why do you think it's important to understand both the positive and negative stakeholder perceptions of your project?



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CAPTURING STAKEHOLDER FEEDBACK AND PERCEPTIONS



01 Key Stakeholders



- Interview to understand project requirements and vision and communication preferences.

02 All Stakeholders



- Interpersonal skills
- Appropriate, regular project communications
- Active listening
- Emotional intelligence

03 Large and Public Groups



- Effective communication
- Questionnaires/surveys methods
- Facilitated conversations/sessions—online or in person
- Digital media email campaigns, websites, group chats
- Posters and advertising

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ANALYZING AND TAILORING COMMUNICATION

PMP ECO 1.4.3

Select communication methods, frequency, technology, and level of detail based on stakeholder needs and project context.



COMMUNICATION: METHODS AND TECHNOLOGIES



Meetings / Verbal

- Physical (face-to-face)
- Virtual (videoconferencing)
- Phone call

Physical

- Body language and gestures
- Whiteboards

Digital / Electronic Media

- Websites and social media
- Instant/text messaging via phone or platform
- Email

Do you use any other communication methods or techniques on your projects?

Are there types your organization does not allow? Why?

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COMMUNICATION REQUIREMENTS ANALYSIS



Creates a clear articulation of **stakeholders' communications needs.**

Enables effective choices about **communication topics, frequency, models, and technologies.**

Findings recorded in your **communications management plan.**

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COMMUNICATION APPROACHES



PUSH
Sent to stakeholder

- Conversation (speaking on the phone, virtual, in-person)
- Email messages
- Messaging
- Memos
- Workshops/collaboration
- Status reports
- Whiteboarding

PULL
Pulled by stakeholder

- Internet site
- Knowledge repository
- Document library

Adaptive teams are colocated whenever possible so that they can be highly collaborative.

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COMMUNICATION
CHALLENGES AND CONSIDERATIONS



01 Urgency of need for information

02 Availability and reliability of technology

03 Ease of use

04 Project environment- e.g., language and formality

05 Sensitivity and confidentiality of information

06 Communications organizational process assets-e.g., social media protocols

07 Data protection laws/regulations

08 Accessibility requirements

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COMMUNICATION MODEL



Prompt: Think of an example of a transmission. Depending on the communication method, what types of noise can interfere?

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PLANNING TO COMMUNICATE WITH STAKEHOLDERS



Your project's stakeholder engagement plan and communications management plan are interlinked artifacts.

STAKEHOLDER ENGAGEMENT PLAN

A component of the program or project management plan that identifies the strategies and actions required to promote productive involvement of stakeholders in program or project decision-making and execution.

COMMUNICATIONS MANAGEMENT PLAN

A component of the portfolio, program, or project management plan that describes how, when, and by whom information will be administered and disseminated.

The team fulfils strategies via communications described in the communications management plan.

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EXECUTING THE STAKEHOLDER ENGAGEMENT PLAN

PMP ECO 1.4.4

Put planned engagement strategies into action, monitor stakeholder responses, and adjust communication and engagement as needed.



Put planned engagement strategies into action.

Monitor stakeholder responses.

Adjust communication and engagement as needed.

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STAKEHOLDER ENGAGEMENT STRATEGY



Involve **stakeholders**.

Enable appropriate **management strategies**.

Create and maintain **relationships**.

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MANAGING STAKEHOLDER ENGAGEMENT



Involves communicating and working with stakeholders to:

- Meet their needs and expectations.
- Address issues as they arise.
- Foster appropriate stakeholder involvement.

Key Benefits

- Increase stakeholder support.
- Minimize resistance to the project.

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MANAGING STAKEHOLDER ENGAGEMENT



To manage stakeholder engagement:

01

Engage stakeholders at **key stages** to secure ongoing commitment.

02

Manage expectations through **clear communication and negotiation.**

03

Address **risks** and anticipate stakeholder **concerns.**

04

Clarify and resolve identified **issues.**

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OPTIMIZING ALIGNMENT

PMP ECO 1.4.5

Continuously connect stakeholder needs and expectations with project objectives, value, and desired outcomes.



Stakeholder Needs & Expectations

Project Objectives

Value & Desired Outcomes

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ALIGNING STAKEHOLDER NEEDS



01

Keep discussions **transparent.**

02

Keep stakeholders informed, manage expectations, and **show the bigger picture.**

03

Engage to build awareness of their **needs and constraints.**

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STAKEHOLDER ENGAGEMENT ASSESSMENT MATRIX: EXAMPLE

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
Stakeholder 1		C			
Stakeholder 2			C	D	
Stakeholder 3					C D

C = Current engagement level | D = Desired engagement level

Tailor stakeholder engagement labels to the project context, team, or organization.

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MANAGING AND LEADING



Management by Objectives

Uses **clear objectives** to guide productivity and encourage aspiration.

Set objectives **collaboratively** with team members.

Create **challenging, yet attainable,** objectives:

- At the start of a project or phase.
- Throughout the project life cycle, as in an iteration planning session.

Servant Leadership

Three steps:

1. **Define** vision.
2. **Align people** to that vision.
3. **Motivate people** to pursue the vision.

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CONTINUOUSLY REALIGNING TEAM EFFORTS WITH VALUE DELIVERY



Prioritize team cohesion and focus on value delivery. As team members or external parties join or depart, or during change or disruption, support the team as it realigns itself.

01

Welcome each new member as a potential source of **new knowledge and motivation.**

02

Help ensure **shared understanding** of project goals and agreements.

03

Collaborate to find out how team members can add value.

04

Navigate disruptions and **conflict constructively.**

05

Prioritize **team cohesion** and focus on value delivery.

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BUILDING TRUST AND INFLUENCE

PMP ECO 1.4.6

Use integrity, honesty, fairness, respect, communication, and credibility to **build trust** and **influence stakeholder support.**



- Integrity
- Honesty
- Fairness
- Respect
- Communication
- Credibility

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VALUES FOR BUILDING TRUST



Integrity

Guide decisions, especially under pressure.

Honesty

Demonstrate integrity and fairness.

Fairness

Build trust by prioritizing the common good.

Respect

Build trust with stakeholders.

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INFLUENCING STAKEHOLDERS



Trust fuels **influence.**

Effective leaders use trust to influence stakeholders and gain support for success.

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DEVELOPING A COMMON VISION

Create a shared understanding of **why the project exists, what success looks like,** and how the desired future state will **create value.**



Why the project exists

What success looks like

How the desired future state will create value

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ENSURING A SHARED VISION WITH KEY STAKEHOLDERS

PMP ECO 1.1.1

Collaborate with key stakeholders to establish a common understanding of the **project purpose, desired outcomes,** and **strategic direction.**



- Project Purpose
- Desired Outcomes
- Strategic Direction

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HELPING EVERYONE UNDERSTAND THE VISION



Guidelines

Use interpersonal and leadership **"power skills"** and **open communication channels.**

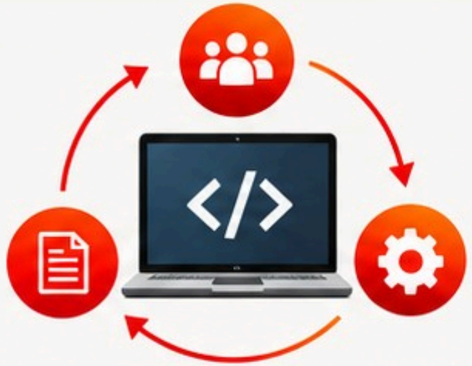
Use **creative, adaptive approaches.**

Product Box Exercise



A technique used to explain a **desired solution or outcome.** Stakeholders try to describe aspects of a solution in the same way a marketer might describe product features and benefits on a box.

Extreme programming (XP) metaphor



A common Extreme Programming (XP) technique that describes a **common vision** of how a program works.

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ONCE YOU HAVE AGREEMENT ON THE PROJECT



Agreements

- Project Purpose
- Objectives
- Scope & Deliverables
- Roles & Responsibilities
- Key Milestones
- Success Criteria

There is no single way to create a **project charter**, but every project needs to have one!

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PROJECT CHARTER



What it does and why it matters:

- **Authorizes** the project
- **Enables the project manager** to apply resources to project work
- **Defines rationale** and business need
- **Verifies alignment** with strategic goals
- Keeps everyone **focused** on a clear project vision

PROJECT CHARTER

A document issued by the **project initiator or sponsor** that formally authorizes the existence of a project and provides the project manager with executive/ stakeholder approval.

Sometimes a statement of work (SOW) can serve as project charter.

Usually created by a **project sponsor or project manager** with the authority to apply organizational resources to project activities.

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WHEN AND HOW ARE THE PROJECT CHARTER USED?



01

Used at the **start of the project.**

02

Used as a **foundation and reference point** for the project.

03

Provides enough **context** to begin planning.

04

Also functions as a **communication and commitment mechanism.**

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PROJECT CHARTER: CONTENTS

A project charter typically includes:

01 **Names:** project sponsor, project manager, key stakeholders

02 **Project description,** including preliminary requirements, measurable objectives

03 **Business needs,** including financial goals or milestones

04 Summary schedule and milestones

05 **Assumptions, boundaries, and constraints,** including overall risk, approval requirements, and approved budget

06 **Information from the business case, including success and exit criteria**



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PROJECT CHARTER: EXAMPLE

Project Charter – Example

Project Name
Customer Portal Implementation

Sponsor
Sarah Johnson, VP Operations

Project Manager
Michael Lee, Project Manager

Key Stakeholders
IT, Marketing, Sales, Customer Support

Project Description
Implement a new customer portal to improve customer experience, enable self-service, and streamline support processes.

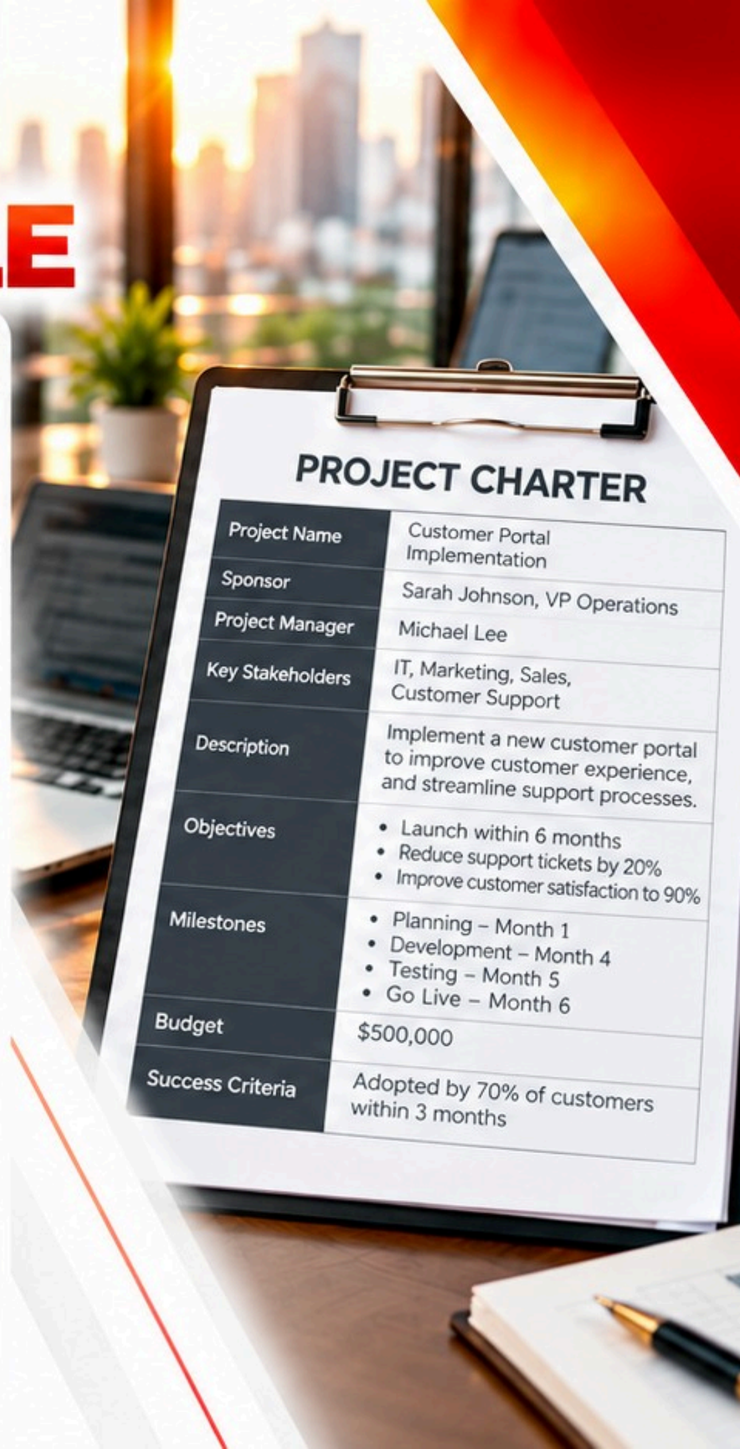
Objectives (Measurable)
- Launch portal within 6 months
- Achieve 20% reduction in support tickets
- Improve customer satisfaction score to 90%

Business Need
Improve customer experience, increase operational efficiency, and support business growth.

Summary Schedule & Milestones
- Planning Complete – Month 1
- Development Complete – Month 4
- Testing & UAT – Month 5
- Go Live – Month 6

Assumptions, Boundaries & Constraints
- Assumes availability of IT resources
- Scope limited to web portal (mobile app in future phase)
- Budget approved: $500,000
- Requires executive approval for major scope changes

Success and Exit Criteria (from Business Case)
- Portal live and adopted by at least 70% of customers within 3 months
- Measurable improvement in customer satisfaction and support efficiency
- Project closed after 3 months of stable operation and handover to the operations team



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PROMOTING THE SHARED VISION

Keeping the Project Vision Current

PMP ECO 1.1.2 and 1.1.3



Revisit the vision as the project evolves so that decisions, changes, and outcomes remain aligned with the intended value.

Revisit Regularly

Reassess the vision as the project progresses.

Align Decisions

Ensure all decisions and changes support the project vision.

Track Outcomes

Measure progress and results against the intended value.

Keep Everyone Aligned

Maintain focus and shared understanding across all stakeholders.

KEY TAKEAWAY

A current vision ensures that the project stays on track, adapts to changes, and continues to deliver the intended value.

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BUILDING A SHARED UNDERSTANDING:

GUIDELINES



01

Share the **project agreements** (vision statement and project charter) with stakeholders and the team.

02

Agree or negotiate to reach **agreement and buy-in.**

03

Project agreements — **stakeholders.**

04

Roles and responsibilities, priorities and assignments — **team.**

05

Uphold the agreements throughout the project. **Use open and reliable communication methods** and your **leadership power skills.**

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WHAT IS A PROJECT VISION?



A project vision is:

A powerful **motivational tool.**

A way to create **passion and meaning** for a project's envisioned goal.

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FEATURES OF A GOOD PROJECT VISION



A good project vision:

- **Summarizes** the project.
- **Describes** the best achievable outcome.
- Creates a **common and cohesive picture.**
- **Inspires** passion for the outcome.

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PROJECT VISION STATEMENT



01

Created by a **project sponsor or executive.**

02

Includes a clear vision of the **desired objectives** and alignment with the organization's **strategic goals.**

03

Use it throughout the project to **maintain alignment.**

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COLLABORATING WITH A PROJECT VISION



01

What is the **project purpose?**

02

What defines **successful project work?**

03

How will the **future be better** when the project outcomes are delivered?

04

How will the project team know that it is **drifting from the project vision?**

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DELIVERING WITH A PROJECT VISION



Shifting focus from deliverables to intended outcomes allows project teams to **deliver on the project vision or purpose,** rather than merely creating a specific deliverable.

While a deliverable may support the intended project outcome, it **may not fully achieve the project vision or purpose.**

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HOLISTIC UNDERSTANDING OF THE PROJECT

Negotiation Goals

First, find out...

01 The **boundaries of negotiation** for the project agreement.

02 What, if anything, is **eligible for discussion or troubleshooting.**

03 The **desired objectives** of the project.

Then:

04 Apply **critical thinking** and business acumen.

05 Discover how the project fits in with the **organizational landscape and business objectives.**



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HOW TO CREATE A HOLISTIC UNDERSTANDING OF THE PROJECT



Ask stakeholders to **elaborate and clarify their vision or inputs,** including asking the sponsor to clarify the project vision statement.

Existing agreements may contain **initial intentions for, or describe, a project:**

- Contracts with external parties
- Memorandums of understanding
- Service-level agreements
- Letters of agreement or intent
- Verbal agreements
- Communication (especially emails) between key stakeholders
- Statements of work (SOW)

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REFERRING TO THE BUSINESS CASE AND BUSINESS NEEDS



Business case:

01 A documented economic feasibility study.

02 Establishes benefits of project work.

03 Provides a basis for authorization of further project activities.

Business needs document:

01 Identifies high-level deliverables.

02 A prerequisite of a formal business case.

03 Describes requirements—what needs creating and/or performing.

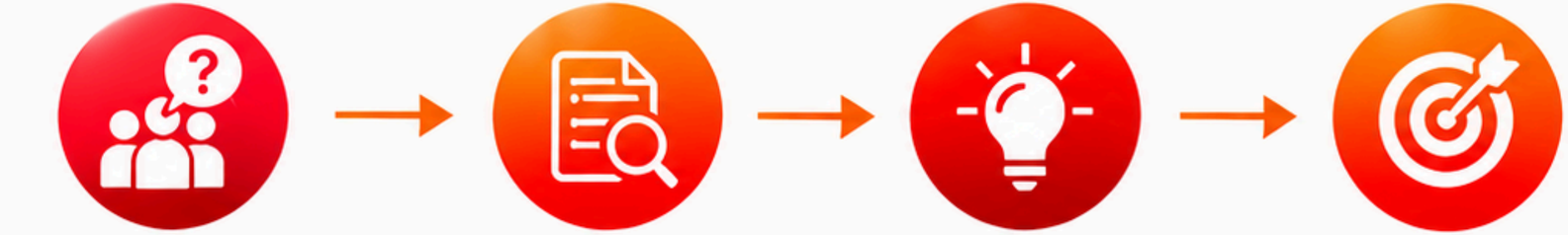
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BREAK DOWN SITUATIONS TO IDENTIFY THE ROOT CAUSE OF A MISUNDERSTANDING OF THE PROJECT VISION

IDENTIFYING THE ROOT CAUSE OF A MISUNDERSTANDING

PMP ECO 1.1.4

When stakeholders interpret the project vision differently, move beyond symptoms and **identify the underlying cause** before agreeing on corrective action.





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IDENTIFYING THE ROOT CAUSE OF A MISUNDERSTANDING



Step 1

Engage with all the relevant stakeholders.

Step 2

Look deeper to identify the actual problem.

Step 3

Analyze all the contributing factors.

Step 4

Investigate potential misunder-standings.

Step 5

Support the agreed-on outcome.

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THE 5 WHYS: AN EXAMPLE

Look Deeper to Identify the Actual Problem

1 Why?	Why didn't you pass the PMP exam?	→ I missed too many questions.
2 Why?	Why did you miss too many questions?	→ You really need to know what they were asking about.
3 Why?	Why didn't you know what they were asking about?	→ I've been on projects for years; I didn't think I needed to study.
4 Why?	What exam areas didn't you study?	→ I know a lot about predictive approaches; not as much about adaptive approaches.
5 Why?	Why didn't you study adaptive approaches?	→ I underestimated the breadth of the exam.



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ISHIKAWA DIAGRAM EXAMPLE

Ishikawa / Fishbone Diagram Example

Materials

- Delivery schedules not aligned with ferry requirements
- Damage to materials during long ferry transit

Methods

- No risk response plans for common island constraints
- Inadequate coordination process with local authorities

Machines

- Breakdown of key machinery with no local repair capacity
- Construction equipment arrived late because of ferry constraints

Delivery/Environment

- Ferry cancellations and delays due to rough seas
- Severe coastal weather created unsafe working conditions

Problem

Eco-lodge construction is behind schedule and may not be ready for the planned UNESCO heritage maintenance announcement.



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PLANNING AND MANAGING COMMUNICATION



Communication should be intentional, audience-focused, timely, and aligned with the project's objectives and stakeholder needs.

- Intentional
- Audience-Focused
- Timely
- Aligned with Objectives

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DEFINING A COMMUNICATION STRATEGY



PMP ECO 1.8.1

Determine **what** information is needed, **who** needs it, **when** it is needed, **how** it should be delivered, and **how understanding** will be confirmed.

01 Determine **what information** is needed.

02 Identify **who** needs it.

03 Define **when** it is needed.

04 Determine **how** it should be delivered.

05 Plan **how understanding** will be confirmed.

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THE COMMUNICATIONS MANAGEMENT PLAN



Identifies team members and stakeholders

- Senders
- Receivers
- Authorizing person (confidential information)

Processes, guidance, and templates for:

- Escalation
- Updating or refining the communications management plan
- Running project status meetings, project team meetings, sending emails, using websites, and the project management information system (PMIS)

Lists stakeholders' communication requirements, including:

- Type of information
- Reason for communication
- Language, format, content, and level of detail
- Timeframe and frequency
- Whether receipt/acknowledgment or response is required
- Constraints

Project information:

- Communication methods and technologies
- Allocated resources (time and budget)
- Glossary
- Flow charts, workflows, list of reports, meeting plans

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THE KICKOFF MEETING



Purpose: Internal/Team—held after agreements are finalized

Internal/Team

01 Establish your project's context.

02 Assist in team formation.

03 Give project charter overview.

04 Align team and stakeholders with project vision.

05 Clarify team member roles and responsibilities (may include the initial team charter).

06 Present results of planning efforts.

Organizational/Public

01 Announce project initiation.

02 Initiate product backlog.

03 Share understanding of high-level vision, purpose, and value.

04 Present product roadmap.

05 Identify your project's sponsor, key stakeholders, and project manager.

06 Include high-level items from the project charter.

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TEAM COMMUNICATION



Effective types of communication includes:

- Verbal
- Written
- Behavioral
- Physical (notice boards)
- Virtual

Include communication expectations and details in the **project charter**.

Organize communications is an essential part of your role as project manager:

- Facilitate team and stakeholder collaboration.
- Manage expectations.
- Check regularly to help make sure it's working!
- Plan and use retrospectives to discuss communications improvements.

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OPTIMIZING COMMUNICATION

Use feedback, retrospectives, appropriate technology, and direct interaction to **continuously improve** how the team and stakeholders communicate.



- Use **feedback**
- Conduct **retrospectives**
- Leverage appropriate **technology**
- Encourage **direct interaction**

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USING FEEDBACK TO SUPPORT HIGH PERFORMANCE



01

Feedback is crucial for any team, using any method, in any environment.

02

Communicate in detail about technical and soft performance aspects.

03

Use appropriate methods (e.g., public or private, individual or group, written or verbal).

04

Give feedback in a timely manner.

05

Request feedback regularly, as and when needed.

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KEY PROJECT MANAGER RESPONSIBILITIES

Keep project communication connected to schedule, performance, change, corrective action, stakeholder needs, and current project information.



01

Execute the schedule using the schedule baseline.

02

Monitor progress and performance against the baseline.

03

Communicate status and changes.

04

Apply corrective and preventive actions.

05

Update stakeholders and documentation.

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RELATIONSHIP BETWEEN THE STAKEHOLDER ENGAGEMENT PLAN AND COMMUNICATIONS MANAGEMENT PLAN

Stakeholder Engagement Plan

- Identification of stakeholders
- Stakeholder analysis
- Engagement strategies
- Monitoring and updating
- Feedback mechanisms

Communications Management Plan

- Communication requirements
- Communication methods
- Roles and responsibilities
- Communication schedule
- Feedback mechanisms



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COMMUNICATION: TWO-WAY ACTIVE LISTENING AND EFFECTIVE FEEDBACK



Active Listening

Requires listener to provide feedback about what they heard by:

- Enables collaboration.
- Restating.
- Paraphrasing.
- Using body language such as nodding the head.
- Confirms understanding and builds trust.

Effective Feedback is:

- Clear, specific, and offered in a timely manner.
- Objective and critical.
- Positive if received and understood as objective.
- Negative if misunderstood or there is a lack of trust and psychological safety.
- Consider lack of feedback as an implicit acceptance of the message by the receiver.

Communication failures are threats to projects, so **discuss communication issues openly** with team members directly, during team retrospectives. In the case of key stakeholders, you might need to **escalate as appropriate**.

AT-PMTECH® SOLUTIONS

EFFECTIVE COLLABORATION



01

Optimize understanding of aims and expectations through open dialogue and meaningful communication.

02

Engage continuously.

03

Accept that engagement levels may fluctuate.

04

Keep discussions transparent.

05

Help ensure stakeholders are knowledgeable and expectations are set.

06

Leverage communication and interpersonal skills, feedback, and meeting management.

07

Maximize the feedback loop—gain meaningful insights.

08

Use effective tools—e.g., shared whiteboards.

AT-PMTECH® SOLUTIONS

COLLABORATION ACTIVITIES



01

Daily coordination meetings.

02

Colocated or face-to-face working.

03

Scheduled sessions—e.g., milestone reviews, backlog refinement sessions, project update meetings.

04

Pairing or coaching, as in knowledge transfer.

05

Negotiations.

AT-PMTECH® SOLUTIONS

COMMUNICATIONS MATRIX



01 Abridged communications management plan that includes:

Abridged communications management plan that includes:

02 Identified team members and stakeholders as:

- Senders
- Receivers
- Authorizing person (confidential information)

03 Stakeholder communication requirements:

- Type of information
- Reason for communication
- Language, format, content, and level of detail
- Timeframe and frequency
- Whether receipt or acknowledgment or response is required

04 Processes, guidance, and templates for escalation

Identify issues → Follow guidance → Use templates → Escalate as needed

05 Project information—Communication methods/ technologies to use

- Email
- Meetings (In-person/Virtual)
- Instant Messaging
- Video Conferencing
- Collaboration Tools
- Project Management Tools

AT-PMTECH® SOLUTIONS

COMMUNICATING AND COLLABORATING TO NEGOTIATE



01

Treat negotiations as conversations with internal and external parties toward reaching agreements.

02

Use effective communication methods to help make sure collaboration with the other party is aimed at reaching consensus.

03

Keep negotiations positive to increase the likelihood of success.

AT-PMTECH® SOLUTIONS

REPORTS AND FORMAL COMMUNICATION



01

Formal reporting at appropriate milestones is a proven way of maintaining continuous communication with stakeholders.

02

It's also needed to obtain sign off or approval on work.

03

Recipients of reports and the desired frequency are noted in the stakeholder engagement plan and the communications management plan.

AT-PMTECH® SOLUTIONS

MONITORING STAKEHOLDERS AND THEIR ENGAGEMENT

01 **Continuously review** stakeholder positions, engagement levels, concerns, and changes in influence.
Update stakeholder analysis when project conditions change.

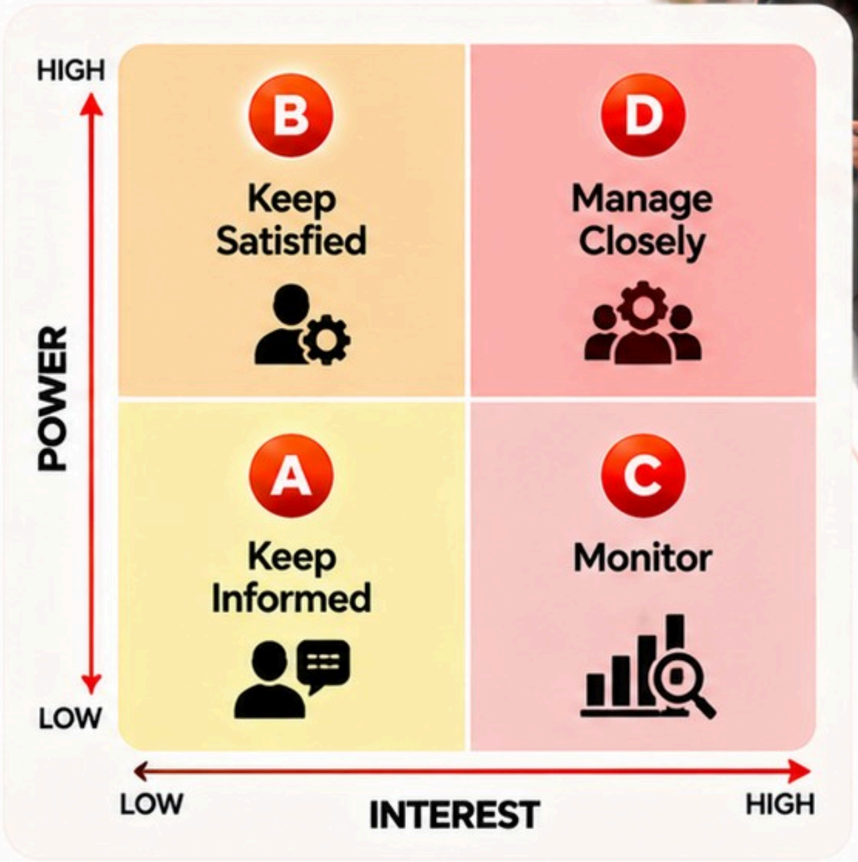
02 **Update** grids at key intervals.

03 Use analysis and expert judgment.

04 Keep a **record of the reasons** for placement to enable future changes.

05 Tailor **management strategies** and actions to individuals, in addition to their place in the grid.

06 **Never use names** on power/influence or power/interest grids.





AT-PMTECH® SOLUTIONS

MEETINGS

Everyone’s time is valuable. Run and participate in meetings efficiently.



01

Everyone’s **time is valuable.** Run and participate in meetings efficiently.

02

Be organized! Provide a clear agenda with purpose and desired outcomes.

03

Timebox discussions.

04

Practice **active listening** and **feedback**.

05

Facilitate **collaboration**.

AT-PMTECH® SOLUTIONS

THE STAKEHOLDER ENGAGEMENT ASSESSMENT MATRIX



Use **expert judgment**, emotional intelligence, and interpersonal skills to assess stakeholders.

Update the stakeholder engagement assessment matrix **regularly and often**.

Engage stakeholders by category to **coach them and find solutions!**

Engagement Category	Typical Mindset	Indicators	Engagement Strategy	Examples of Actions
Leading	Highly supportive and actively engaged	Commits resources, champions the project, influences others	Keep engaged and involved	Regular updates, seek input, involve in key decisions
Supporting	Supportive but not actively leading	Willing to help, provides input, shows interest	Keep informed and consult	Share progress, seek feedback, invite to key meetings
Neutral	Neither supportive nor resistant	Limited interest, waits to see results, minimal involvement	Keep informed and monitor	Provide relevant updates, highlight benefits, address concerns early
Resistant	Skeptical or concerned	Questions value, raises concerns, may delay decisions	Manage closely and address concerns	Understand reasons, provide clear information, involve in problem-solving
Opposed	Actively against the project	Blocks progress, influences others negatively	Manage closely and seek to win over	Direct discussions, address key concerns, find mutually acceptable solutions

AT-PMTECH® SOLUTIONS

ALIGNING OUTCOMES WITH CUSTOMER EXPECTATIONS

Keep project outcomes connected to **measurable customer expectations** and agreed success criteria.

The goal is not simply to deliver outputs — it is to **deliver value** that stakeholders recognize as **successful.**



1. Understand Customer Needs
2. Define Clear Success Criteria
3. Deliver Quality Outcomes
4. Validate with Stakeholders
5. Create Recognized Value

AT-PMTECH® SOLUTIONS

ALIGNING OUTCOMES WITH EXPECTATIONS



01

Document stakeholder expectations and requirements in the project charter.

02

Establish measurable success criteria for outcomes.

03

Use stakeholder **registers and requirements documents** for clarity.

04

Align expectations with project requirements.

AT-PMTECH® SOLUTIONS

MAINTAINING ALIGNMENT THROUGHOUT THE PROJECT

Sustain alignment with ongoing communication:

01

Monitor progress and customer satisfaction regularly.

02

Use reports, meetings, and feedback loops.

03

Address misalignment quickly to avoid rework.

CONTINUOUS COMMUNICATION



AT-PMTECH® SOLUTIONS

TOOLS AND TECHNIQUES

Use complementary tools to maintain alignment and visibility:

01
Stakeholder engagement assessment matrix

02
Communications management plan

03
Requirements traceability matrix

04
Surveys

05
Product demonstrations

06
Feedback loops



AT-PMTECH®
SOLUTIONS

OPTIMIZING TEAM COMMUNICATION
TO MONITOR AND MEET STAKEHOLDER EXPECTATIONS



01

Establish the **Communications Management Plan Early**

02

Foster a **Collaborative Environment**

03

Align **Communication to Objectives and Roles**

04

Use the **Right Tools** for the Right Messages

05

Make **Communication** Part of the Project Routines

AT-PMTECH® SOLUTIONS

SUPPORTING TEAM ACCOUNTABILITY TO MEET STAKEHOLDER EXPECTATIONS

01
Create Clear, Measurable Objectives

02
Clarify Roles and Responsibilities

03
Integrate Accountability into Daily Work

04
Foster Psychological Safety

05
Monitor Progress with Key Performance Indicators (KPIs) or Milestones

06
Provide the Right Tools

07
Recognize and Celebrate Follow-Through



AT-PMTECH®
SOLUTIONS

WE NEED A FEEDBACK LOOP



01 Stakeholder input

02 Communication

03 Team response

04 Adjustment

05 Stakeholder feedback

A healthy feedback loop helps **identify gaps early, reduce surprises**, and **continuously improve alignment.**

AT-PMTECH® SOLUTIONS

PLANNING TO ENGAGE AND COMMUNICATE WITH STAKEHOLDERS



Predictive and adaptive approaches may use different artifacts and levels of formality.
The principle remains the same: tailor stakeholder engagement to **project needs, stakeholder preferences,** and the environment.

Predictive approach:

- Create a stakeholder register as your first key formal stakeholder engagement plan artifact.
- Refer to organizational process assets such as:
  - Stakeholder register templates and instructions.
  - Registers from previous projects
    Lessons learned on stakeholder preferences and actions.

Adaptive approach:

- A stakeholder engagement plan may not be required.
- A stakeholder register may or may not be created.
- Each project is tailored according to project needs and preferences.

AT-PMTECH®
SOLUTIONS

YOUR STAKEHOLDER ENGAGEMENT PLAN

Your stakeholder engagement plan is a component of your project management plan that outlines strategies and actions for:

01

Promoting productive **stakeholder involvement**

02

Supporting **decision-making** and **project execution**

03

Establishing, building, and maintaining **stakeholder relationships**

A well-crafted stakeholder engagement plan turns communication into **collaboration** and builds **long-term success**.



AT-PMTECH® SOLUTIONS

COMMUNICATION REQUIREMENTS ANALYSIS

To understand their communication needs and preferences:



01

Engage stakeholders directly.

02

Discuss key aspects such as:

- Frequency of communication
- Methods and technologies used
- Subjects to be communicated

03

Help establish a feedback loop, where:

- Stakeholders share preferences and concerns
- The team adjusts its communication strategy accordingly

AT-PMTECH®
SOLUTIONS

THE IMPORTANCE OF COMMUNICATION REQUIREMENTS ANALYSIS



01

Leads to a clear description of stakeholder communication needs.

02

Enables effective choices about communication topics, frequency, models, and technologies.

03

Establishes a feedback loop, where stakeholders know their input influences communication planning.

AT-PMTECH® SOLUTIONS

PROMOTING TRANSPARENCY AND COLLABORATION



Establish a **feedback loop** and understand **reporting requirements** so that stakeholders receive useful information and can influence decisions at the right time.

Promoting Transparency and Collaboration

Establishing a Feedback Loop

Understanding Reporting Requirements

PMP ECOs 1.8.2, 1.8.3, and 1.8.4

AT-PMTECH®
SOLUTIONS

ASSESSING THE PROJECT ENVIRONMENT



01 Project Type

A predictive approach may require more **directive or authoriivative leadership.**

02 Complexity

High-complexity projects may need a **collaborative or transformational style** to align diverse stakeholders.

03 Urgency

Crisis situations may call for **more decisive, autocratic leadership—** at least in the short term.

An adaptive approach benefits from **servant leadership, empowerment, and facilitation.**

AT-PMTECH® SOLUTIONS

UNDERSTANDING YOUR TEAM'S NEEDS



01 Skill and Experience

An inexperienced team may need more guidance and structure.

An expert team is likely to perform better with autonomy and trust.

02 Motivation

Use emotional intelligence to read your team's mood, stress levels, and motivation.

Low morale may require a transformational or coaching style.

AT-PMTECH® SOLUTIONS

ORGANIZATIONAL CULTURE



01 Authoritarian or Participative

Your leadership style **should not conflict with** your organization's norms.

02 Stakeholder Expectations

Senior stakeholders may expect **more structured updates or more control.**

AT-PMTECH® SOLUTIONS

LEADERSHIP SKILLS AND COMPETENCIES

- Communication
- Conflict management
- Critical thinking
- Cultural awareness
- Decision-making
- Emotional intelligence (EI) techniques
- Ethical approach (PMI Code of Ethics and Professional Conduct)
- Expert judgment
- Facilitation
- Meeting management
- Negotiation
- Networking
- Team building



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SOLUTIONS

APPROPRIATE LEADERSHIP STYLE



- Project context
- Team capability and experience
- Urgency and complexity
- Organizational culture
- Stakeholder expectations

Adapt the style as the situation changes.

Determining an appropriate leadership style depends on your project's context, your team's needs, and your organizational environment. This means choosing the approach that best supports your team and project at a given point in time.

AT-PMTECH®
SOLUTIONS

GUIDELINES FOR DEVELOPING INCLUSIVE LEADERSHIP COMPETENCIES



01

Tailor your leadership approach and style.

02

Lead with empathy.

03

Understand that motivations and working styles vary.

04

Maintain transparency and openness to build trust.

05

Help ensure external resources are included.

AT-PMTECH® SOLUTIONS

LEVERAGING LEADERSHIP MODELS

Style	Best when ...	Characteristics	Decisions
Directive	Decisions must be made quickly; team needs structure	Gives clear instructions; controls process	
Supportive	Team needs more motivation or a morale boost	Builds trust; focuses on well-being	
Servant	In adaptive or collaborative environments	Empowers teams; removes obstacles	
Transformational	Change is needed; vision must be communicated	Inspires; aligns with shared purpose	
Transactional	Performance needs to be tightly managed	Rewards or punishments based on outcomes	
Democratic	Team input is valuable for discussions	Encourages participation and consensus	



AT-PMTECH® SOLUTIONS

ADOPTING A GROWTH MINDSET

01 Let past experiences and processes **provide guidance** for, **but not dictate**, your actions.

02 Commit to continuously **improve and innovate** to find new ideas and perspectives.

03 Discover the best approach through **discussion and introspection.**

04 **Avoid complacency** and blind acceptance.



GROWTH MINDSET

A growth mindset, as conceived by Stanford psychologist Carol Dweck and colleagues, is the belief that a person's capacities and talents can be improved over time.

AT-PMTECH® SOLUTIONS

POWER SKILLS

Project professionals use interpersonal power skills, including collaborative leadership, communication, an innovative mindset, for-purpose orientation, and empathy. Teams with these skills can maintain influence with a variety of stakeholders—a critical component for making change.



- **Collaborative Leadership**
- **Communication**
- **Innovative Mindset**
- **For-Purpose Orientation**
- **Empathy**

AT-PMTECH® SOLUTIONS

INTERPERSONAL AND TEAM SKILLS



- Active listening
- Motivation
- Communication styles assessment
- Nominal group technique
- Emotional intelligence (EI)
- Political awareness
- Influencing
- Transparency

ACTIVE LISTENING

Being attentive and participatory when engaging with another individual. It involves specific skills, such as repeating or rephrasing what the speaker said in your own words to confirm understanding, using nonverbal cues to show you are engaged, and asking for clarification or expansion when needed.

COMMUNICATION STYLES ASSESSMENT

A technique to identify the preferred communication method, format, and content for stakeholders for planned communication activities.

AT-PMTECH® SOLUTIONS

TEAM BUILDING

Cohesion and solidarity help teams **perform better.**

Good leadership **facilitates bonding** among project team members.

Team-building activities **build unity, trust, and empathy,** and focus on the team over the individual. They can be:

- Formal or informal
- Brief or extended
- Facilitated by yourself or a professional facilitator



Can you share an example of a positive team-building experience?

AT-PMTECH® SOLUTIONS

BALANCING TEAM TONE WITH A SENSE OF URGENCY



TONE

- Use fluid communication and engagement.
- Promote positive interactions.

URGENCY

- Emphasize the project's vision and value.
- Commit to and be accountable for delivering value.

Envision the team as an active participant in delivering the organization's **strategic vision.**

AT-PMTECH® SOLUTIONS

IMPORTANCE OF ARTIFACTS

Artifacts preserve decisions, agreements, requirements, plans, and changes.

Good artifact management supports transparency, continuity, governance, learning, and future projects.

Artifacts enable reconstruction of the history of the project and benefit other projects.

Any documentation, plan, or item that could be used to reconstruct the history of the project or product, especially where changes were made, should be **maintained and archived once the project is complete.**



AT-PMTECH® SOLUTIONS

PROJECT REPORTING REQUIREMENTS



Project reporting requirements are essential for helping ensure **effective communication, decision-making,** and **problem resolution.** When establishing reporting requirements, focus on:

CONTENT

Focus on key information like scheduling, cost, progress, and corrective actions.

FORMAT

Tailored to stakeholders' needs—from simple summaries to detailed reports.

FREQUENCY

Regular reporting aligned with project milestones or organizational schedules.

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SOLUTIONS

REPORTING TOOLS

Useful tools for clarifying reporting requirements:



Project Management Information Systems (PMIS):

Help gather, integrate, and distribute project data.

Automated Reporting Tools:

Streamline gathering and analysis of key performance indicators (KPIs).

Requirements Management Tools:

Facilitate effective capture and storage of reporting requirements.

Visualization Software:

Convert data into easy-to-understand visuals for stakeholder presentations.

AT-PMTECH®
SOLUTIONS

CREATING REPORTS ALIGNED WITH SPONSOR AND STAKEHOLDER EXPECTATIONS



Supporting Reporting and Governance Processes

PMP ECO 1.8.5 and 1.8.6

Reports should provide the **right information**, at the **right level of detail**, to the **right audience**, at the **right time**.

AT-PMTECH® SOLUTIONS

INFORMATIION MANAGEMENT SYSTEMS

Project Management Information Artifact System (PMIS) Management Systems

Gather, integrate, and share project data.

Store and maintain project artifacts.

Help ensure consistency in collection and reporting.

Microsoft SharePoint or Teams

Microsoft Project or similar

Google Drive



AT-PMTECH® SOLUTIONS

SUPPORTING GOVERNANCE PROCESSES



When you are planning and managing communication, it's important to consider what we learned around including governance processes. Remember the key points from that lesson:

- Be proactive with governance and compliance.
- Communicate frequently with the appropriate parties.
- Be as transparent as possible, as it will reduce problems down the road.

AT-PMTECH®
SOLUTIONS

ALIGNING STAKEHOLDERS

PMP ECO Task 1.5

Align **stakeholder expectations, project objectives, success criteria,** and **communication** so that everyone is working toward a shared outcome.



AT-PMTECH® SOLUTIONS

CATEGORIZING STAKEHOLDERS

PMP ECO 1.5.1

Group stakeholders using relevant characteristics such as **power, interest, influence, impact, legitimacy**, and **urgency** to determine appropriate engagement approaches.

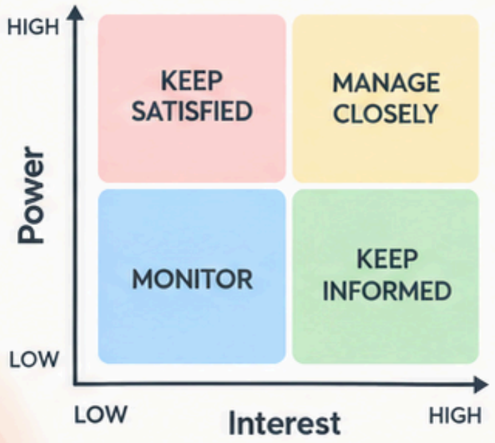


AT-PMTECH® SOLUTIONS

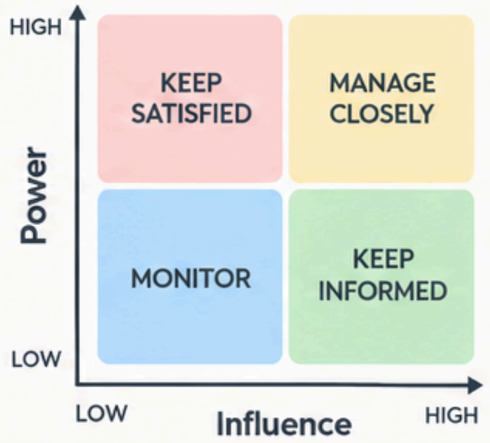
STAKEHOLDER MAPPING

Use two dimensions to map stakeholders:

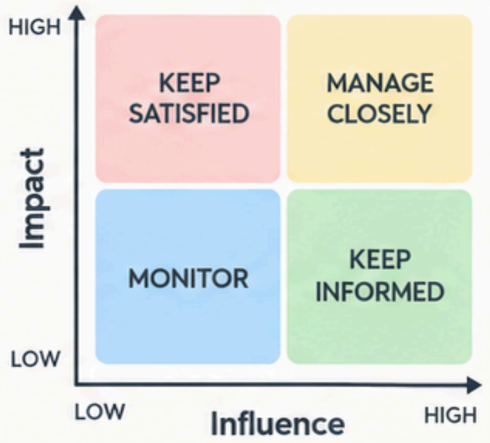
Power/Interest Grid



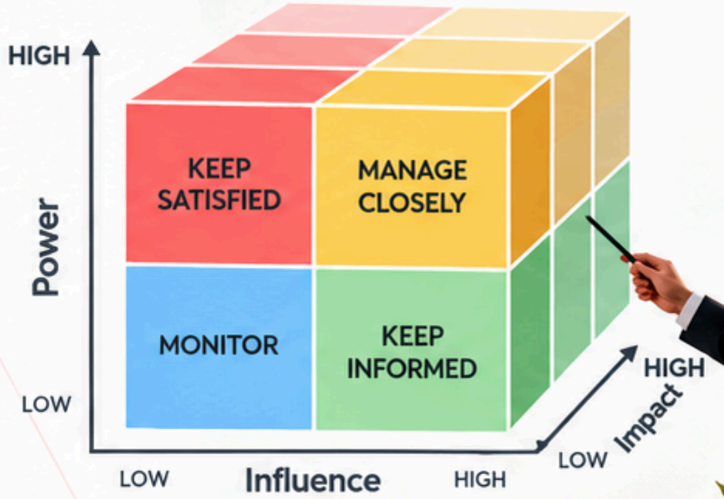
Power/Influence Grid



Impact/Influence Grid



Or use three dimensions — a cube — to refine the analysis further!



Method:

1. Place each stakeholder on the grid (do not use names).
2. Use the same quadrant labels but change the axis labels.

AT-PMTECH® SOLUTIONS

DIRECTIONS OF INFLUENCE

You should understand the social network of project stakeholders, specifically the **direction of their influence** on the project.

Upward	Parent organization — senior management (business, financial interests)
Downward	In the project hierarchy — team or specialists
Outward	Have a stake in the project — client, end user, external
Sideward	Friendly or competitive for resources — project manager's peers, other organizational departments



AT-PMTECH® SOLUTIONS

SALIENCE MODEL

URGENCY

Level of required attention/detail

- Time constraints
- High stakes
- Indicating level of involvement with the project

LEGITIMACY

Appropriate involvement or proximity, as applied to team stakeholders, indicating level of owner role.

- Focus on the product or project work
- Are they familiar, interested, and engaged enough with the project to make decisions and move the project forward?

POWER

Level of authority

- Ability to influence decisions
- Control over resources
- Formal position or informal influence
- Can support or block the project



AT-PMTECH® SOLUTIONS

IDENTIFYING STAKEHOLDERS' EXPECTATIONS

PMP ECO 1.5.2

Discover what stakeholders consider valuable, acceptable, successful, and realistic — then connect those expectations to project objectives and constraints.



VALUABLE

What do they consider important?

ACCEPTABLE

What are their must-haves and boundaries?

SUCCESSFUL

How do they define success?

REALISTIC

What is achievable within the project constraints?

AT-PMTECH® SOLUTIONS

WORKSHOPS AND INTERVIEWS



WORKSHOPS

Facilitated workshops bring stakeholders together to collaborate on specific objectives.



INTERVIEWS

Interviews are used to elicit information from stakeholders in a one-on-one setting.

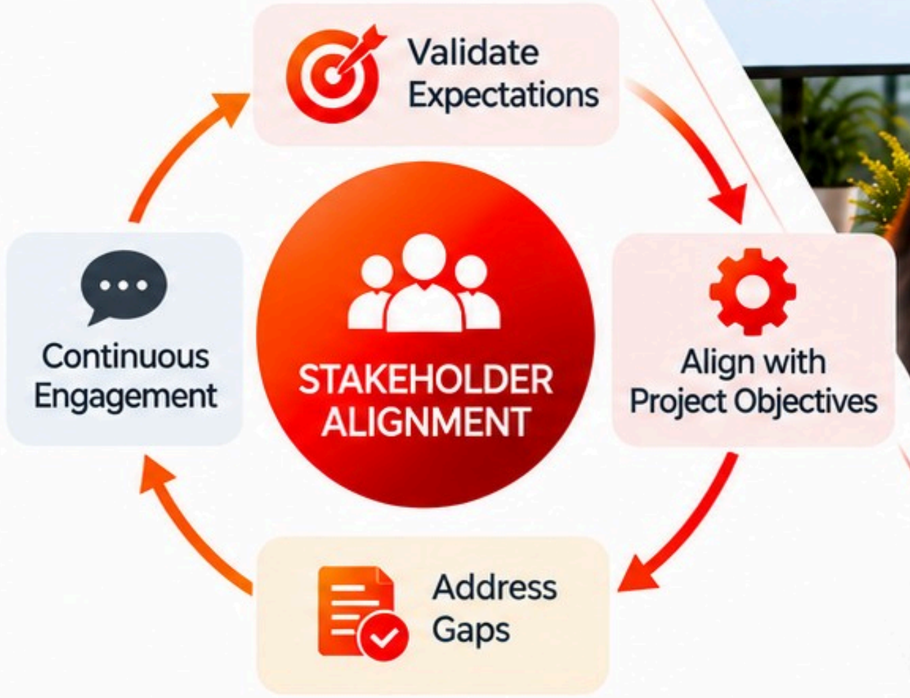


AT-PMTECH® SOLUTIONS

VALIDATING AND ALIGNING

Engage your stakeholders regularly to validate their expectations and align them with your project's objectives.

- Clarify any misunderstandings and address expectations that may not be feasible within the scope of the project.
- Implement feedback loops.
- Document agreements and decisions.





AT-PMTECH® SOLUTIONS

NEGOTIATING AND AGREEING ON PROJECT SUCCESS CRITERIA

Interview stakeholders.

Gather expert judgment on technical success criteria.

Check:

- Organizational (program, operations) key performance indicators (KPIs)
- Lessons learned and historical data
- Quality policy
- User acceptance testing requirements
- Reporting and verification criteria for leadership
- Identification of deliverable and objective acceptance criteria for each test
- A definition of done (DoD) may be identified for the project, in addition to iteration outputs.

KEY PERFORMANCE INDICATOR (KPI)

Metric defined by an organization's objectives.

It is used to evaluate an organization's progress toward meeting the targets or end states in their objectives or goals, helping to achieve strategic alignment.



AT-PMTECH® SOLUTIONS

FACILITATING DISCUSSIONS TO ALIGN EXPECTATIONS

PMP ECO 1.5.3

Prepare, facilitate, and follow up on stakeholder discussions so that expectations, agreements, decisions, and action items are clearly understood.



PREPARE

- Identify objectives and stakeholders
- Review background information
- Prepare discussion questions and agenda
- Choose appropriate format (workshop or interview)

FACILITATE

- Create an open and collaborative environment
- Encourage balanced participation
- Clarify and explore stakeholder expectations
- Identify areas of agreement and disagreement
- Guide toward mutually acceptable solutions

FOLLOW UP

- Summarize key discussion points
- Confirm agreements and decisions
- Document action items with owners and due dates
- Share outcomes with stakeholders
- Monitor progress and keep communication open

CLEAR EXPECTATIONS | **AGREEMENTS** | **DECISIONS** | **ACTION ITEMS**

AT-PMTECH® SOLUTIONS

BEFORE THE MEETING

SET CLEAR AND PLAN OBJECTIVES

Clearly define the objectives of the meeting, project's objectives, and stakeholder expectations.



GATHER RELEVANT DATA

Gather relevant data and information about the project's status, objectives, and stakeholder expectations.



COMMUNICATE IN ADVANCE

Clearly define the objectives of the meeting and share them with all participants beforehand.





AT-PMTECH® SOLUTIONS

DURING THE MEETING



ENGAGE STAKEHOLDERS EFFECTIVELY

Encourage all stakeholders to participate actively.



FACILITATE COMMUNICATION

Apply effective facilitation techniques to manage the flow of the meeting.



CLARIFY AND BUILD CONSENSUS

Try to help make sure that everyone has a common understanding of project objectives.



GATHER RELEVANT DATA

Gather relevant data and information about the project's status, objectives, and stakeholder expectations.



KEEP THE DISCUSSION ON TRACK

Ensure the meeting stays focused on the objectives and desired outcomes.

AT-PMTECH®
SOLUTIONS

AFTER THE MEETING



DOCUMENT AND FOLLOW UP

Document the key outcomes, agreements, and action items from the meeting.



CREATE AN ATMOSPHERE OF TRUST

Foster a positive and open environment where stakeholders feel comfortable sharing their thoughts and concerns.



ENCOURAGE OPEN COMMUNICATION

Create an atmosphere of trust where stakeholders feel comfortable sharing their thoughts and concerns.



AT-PMTECH®
SOLUTIONS

ORGANIZING AND ACTING ON MENTORING OPPORTUNITIES

PMP ECO 1.5.4

Use mentoring to strengthen capability, transfer knowledge, support collaboration, and create opportunities for people to learn from experience.



STRENGTHEN CAPABILITY

Develop skills and build confidence through guidance and experience.

TRANSFER KNOWLEDGE

Share expertise, insights, and lessons learned to enhance understanding.

SUPPORT COLLABORATION

Encourage knowledge sharing and teamwork across individuals and teams.

CREATE OPPORTUNITIES TO LEARN

Provide real-world learning opportunities and help people grow from experience.

AT-PMTECH® SOLUTIONS

SETTING UP YOUR MENTORING PROGRAM





DEFINE YOUR PURPOSE AND OBJECTIVES

Clearly outline the goals of the mentoring program.



ASSESS YOUR NEEDS

Identify gaps in skills or knowledge within your organization.



RECRUIT AND SELECT PARTICIPANTS

Identify and recruit potential mentors and mentees.



AT-PMTECH SOLUTIONS

PREPARING YOUR MENTORING PROGRAM FOR SUCCESS



MATCH MENTORS AND MENTEES

Match mentors and mentees based on their goals, interests, and experience levels.



PROVIDE TRAINING FOR PARTICIPANTS

Train mentors and mentees on how to make the most of the mentoring relationship.



AT-PMTECH®
SOLUTIONS

RUNNING YOUR MENTORING PROGRAM



IMPLEMENT THE PROGRAM

Launch the program with clear timelines, structure, and planned activities.



ENCOURAGE TWO-WAY LEARNING

Promote an environment where both mentors and mentees can learn from each other's experiences.



PROVIDE ONGOING SUPPORT

Check in regularly with participants to offer support and resolve any issues.



AT-PMTECH SOLUTIONS

EVALUATING AND MONITORING THE PROGRAM

CONTINUOUSLY EVALUATE

Continuously evaluate the program's effectiveness through feedback from participants.



DOCUMENT OUTCOMES AND SUCCESSES

Document outcomes and successes to demonstrate the value of the mentoring program.





AT-PMTECH®
SOLUTIONS

MANAGING STAKEHOLDER EXPECTATIONS

Effective expectation management requires continuous discovery, communication, alignment, feedback, and adjustment throughout the project life cycle.



AT-PMTECH®
SOLUTIONS

IDENTIFYING INTERNAL AND EXTERNAL CUSTOMER EXPECTATIONS

Understand what internal and external customers need from the project and how their expectations may differ.



AT-PMTECH®
SOLUTIONS

INTERNAL VERSUS EXTERNAL STAKEHOLDERS



INTERNAL STAKEHOLDERS

Employees, departments, or units within the organization.

Their expectations often revolve around the support, resources, and information that can enable their job performance.



EXTERNAL STAKEHOLDERS

Clients, users, regulators, or other external parties.

The focus is on fulfilling their needs, meeting promises, and exceeding requirements.



AT-PMTECH®
SOLUTIONS

IDENTIFYING EXPECTATIONS



Gather feedback regularly through surveys, focus groups, and interviews.

Analyze previous interactions, performance data, and experiences.

Remain mindful of external factors like industry standards, competitive offerings, and market trends.

Closely involve customers, both internal and external, in defining requirements, participating in pilots, and providing incremental updates during a project's lifecycle.

Prioritize transparent and continuous information exchange.

Monitor key performance indicators for customer satisfaction and engagement and adjust based on performance trends.

Strive not only to meet expectations but to exceed them wherever feasible.

AT-PMTECH® SOLUTIONS

TOOLS AND TECHNIQUES TO IDENTIFY EXPECTATIONS



Stakeholder analysis

Researching and analyzing quantitative and qualitative information about stakeholders.

Elicitation techniques

Techniques include interviews, surveys, focus groups, workshops, or observation sessions.

Kano analysis

Helps categorize customer requirements into basic features, performance features, delighters, indifferent features, and reverse features.

AT-PMTECH®
SOLUTIONS

ALIGNING AND MAINTAINING OUTCOMES TO CUSTOMER EXPECTATIONS

PMP ECO 1.6.2

Continuously verify that delivered outcomes remain aligned with customer needs, agreed success criteria, and organizational strategy.



AT-PMTECH®
SOLUTIONS

STRATEGIC ALIGNMENT

Use governance frameworks to support alignment at each level—portfolios, programs, and projects.

For example, using portfolio management practices helps you choose the correct projects that support those portfolios.



AT-PMTECH® SOLUTIONS

STAKEHOLDER ENGAGEMENT AND COMMUNICATION



For internal stakeholders:

Regular updates on project milestones, risks, and results help maintain alignment with organizational priorities.

For external stakeholders:

Information such as product roadmaps, release plans, and usage benefits should be presented in a customer-focused manner.

AT-PMTECH®
SOLUTIONS

MONITORING CUSTOMER SATISFACTION AND EXPECTATIONS

PMP ECO 1.6.3

Track satisfaction and changing expectations, identify gaps early, and respond with appropriate adjustments.



AT-PMTECH® SOLUTIONS

MONITORING SATISFACTION



Customer Satisfaction

Collect feedback on experiences and areas needing improvement.

Net Promoter® Score (NPS)

This metric evaluates customer loyalty and satisfaction.

Statistical Improvement Tools

Tools like control charts, cause-and-effect diagrams, and Pareto charts help analyze data trends.

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END OF LESSON 3

Key themes:

- Engage stakeholders intentionally.
- Build and maintain a common vision.
- Communicate clearly and continuously.
- Align stakeholders and expectations.
- Monitor feedback and adapt throughout the project.



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THANK YOU

Stakeholders • Vision • Communication