The First Weeks: Making a Positive First Impression and Setting Appropriate Expectations

By Joel Prothro, PMP

Executive Summary

As we experience the value of first impressions in our personal lives, the value of the first steps on a project cannot be overstated. When a project is in its infancy, we must pay close attention to the messages we are sending to our customers, stakeholders, and partners.

Getting a project started correctly is the key to a smooth execution in the later phases. In order to make a positive first impression, we must consider not only the first customer contact, but also the sales handoff, internal and external kickoffs, project plan, and initial project schedule. This white paper will answer the question: What are the tangible and intangible elements that need to be addressed in the first weeks of a project that give the team a solid foundation on which to build a successful engagement?

Who Should Read this White Paper?

This white paper benefits anyone who is responsible for project or program oversight, governance, or execution. We will explore the key elements of project initiation so that the sales team, customer, and partners are confident in the project team's ability to successfully execute the tasks ahead.

The Importance of First Impressions

The value of first impressions is not lost in our personal lives. We can all remember times when we immediately formed an opinion about a person or place that we could not seem to shake. The July 2006 issue of *Psychological Science* includes an article by Princeton psychologists, Janine Willis and Alexander Todorov, which states that we form our first impressions of a stranger from his or her face in one-tenth of a second, and longer interactions do not significantly change those first impressions. Think of friends, favorite restaurants, or vacation spots; much of what we surround ourselves with is due to our judgments in the first moments of our first encounters. For example, after looking at a several dozen houses before a recent move, my wife was just three steps inside our current house before she decided it was **the one**. Consider modern grocery stores, where management pays close attention to the sights and smells that greet the shopper when he or she walks in the door. Very seldom do we reconsider the impressions made within the first minutes; if we do, it often involves a mountain of evidence disproving our previous judgments.

The first impressions of a project team are no different. The sales team, customer, and partners are all, perhaps unknowingly, quickly making judgments on the project delivery team's competency. Although a documented resource plan is critically important, customers are determining roles and responsibilities in their heads well before anyone opens their spreadsheet to fill out a roles and responsibilities matrix.

Perhaps my favorite example of this comes from Bill, a colleague in project management, who was telling me about his first call on one of his projects with the customer's project manager. This particular customer was known in Bill's organization as often being unreasonable and hostile to project teams. The customer's project manager was telling Bill that his style was to push vendors by saying, "If you tell me you'll have something to me on Friday, I'm going to ask you to get it to me on Tuesday." Later in the conversation, Bill volunteered to put together a team contact list and he promised it in two days. To that, the customer's project manager replied, "See, Bill? That's exactly what I mean; I want you to have the contact list to me first thing tomorrow morning." Bill's response was: "In that case, I will not be providing the contact list." It is not being suggested here that we should defy our customers, but in this particular case, Bill's response was perfect. The contact list was not a part of any statement of work (SOW) and Bill was volunteering it as a way to getting the project started. He was providing a first impression: one that spoke to his insistence that he and his team were competent professionals who knew how to deliver the project and would not accept abuse by their customer. Bill's response actually created a very positive project environment for a usually hostile customer, because the customer realized that Bill was a strong leader who would guide the team to success.

The Importance of Setting Expectations

In addition to ensuring an appropriately positive first impression, it is crucial that the project manager immediately begin to set expectations for the project. In a perfect world, everyone's expectations would be aligned and this step would be unnecessary. But, a project manager is also unnecessary in a perfect world; so, I am happy it does not exist. In the real world, expectations often do not match, and the first weeks of the project is the key time period to align the team.

In many organizations, by the time the project manager is involved, the sale is completed, and the customer already has expectations for what the project will accomplish. Unfortunately, many project managers' modus operandi for setting expectations is simply walking in with the delivery

team and declaring to the customer what is going to be delivered. This method often causes unnecessary conflict, because the project manager can appear as if he or she has no understanding of the discussions that have taken place. To appropriately set expectations, the project manager must be direct and honest but must also understand the expectations from several sources: the delivery team, the SOW, the sales team, the partner, and, most importantly, the current customer expectations. Understanding everyone's view of the project will allow the project manager to communicate the deliverables of a project in a way that aligns all team members to the common goals.

What are the key ways to promote positive first impressions and appropriate expectations?

Getting off the Ground
The Handoff from Sales

Where the project manager begins his or her involvement in a project varies from organization to organization. For the purposes of this white paper, we will look at the transition from the sales team after the project has been scoped and booked. The sales team has been working with the customer on the details of the project prior to this point, and the project manager should align with the sales team first. The customer is not starting a project for the project's sake, and the sales team usually holds the valuable information on the customer's business drivers for the project. Why did the customer choose to do this project now over all the others that they could have chosen? What is the reasoning behind the timeline? Are there other projects planned as follow-ups? Although not an exhaustive list, these are valuable questions on which the sales team can shed some light. The project manager who understands the answers to these questions will be better prepared to begin setting a positive first impression and solid expectations.

The First Contact with the Customer

A few years ago, I received a telephone call asking me to begin a new project. The customer was eager to get started, and I was asked to call the customer that day to let him know that I had been assigned to the project. I called the customer to introduce myself and to say that I was excited to begin the project. The call was quick because I knew little about the project at that point. I do not believe this short call hurt the project, but I do believe it was a missed opportunity to create a positive first impression by showing the customer that I was knowledgeable and experienced and had an idea of the purpose of the project. Consider if I would have been

able to appropriately prepare—I would have talked to sources familiar with the project and gotten a general feel for the business drivers and deliverables for the project. If you were the customer's project manager, think of how much more confident you would have felt by just hearing a few facts about the major deliverables, business drivers, and timelines. Instead of just alerting the customer that a project manager had been assigned, the call could have helped create a positive first impression for the team.

Getting Buy-In
Aligning the Internal Teams: The Internal Kickoff
Setting expectations is a step-by-step process of aligning different groups of people to one goal. The first groups that need to be aligned are the various internal teams. A string of emails stating the requirements from the sales team is not sufficient for aligning the internal teams. A kickoff meeting, including all the key internal resources, is necessary. While the sales team informs the delivery team of the background of the project and what the customer is expecting, the delivery team informs the internal team of how best to meet the customer's requirements. The delivery team also understands if there are any requirements that might need adjusting due to timelines, technical feasibility, or operational supportability.

These discussions should be detailed and should include a review of the customer kickoff presentation (discussed below). Any conflict during this meeting should be resolved before the meeting with the customer. Once the internal team is aligned, it is time to begin conversations with the customer.

Aligning the External Teams: The External Kickoff
The number one most valuable time to set appropriate expectations and provide a positive first impression is during the customer kickoff. With that in mind, the project manager needs to begin planning the customer kickoff as soon as possible after he or she is assigned to the project. A good customer kickoff presentation walks the customer through the major parts of the project plan, including the resource plan, timeline, communication plan, deliverables list, included and excluded services, and customer and partner responsibilities. A solid customer kickoff presentation is the foundation of a positive customer kickoff meeting.

Making sure the key resources are present is also crucial to a useful kickoff meeting. Remember that a main purpose of a project kickoff is to begin setting appropriate expectations, and if expectations are set with the wrong people, they are useless. Take an example in which the kickoff meeting includes everyone but the customer's project

sponsor. The team walks through the kickoff and comes to an agreement as to what the project is to produce. Months later, when the project is completed, as agreed on in the kickoff, the sponsor refuses to sign completion papers because it did not accomplish what he expected. Perhaps this example is extreme, but it is not unheard of in project management.

Not only do the appropriate resources from a customer perspective need to be available for the kickoff, but from your team as well. This is not a meeting the project manager should try to conduct with just the delivery team. He or she also needs the internal project sponsor, the sales team, those who negotiated the statement of work with the customer, the owners of the customer relationships, and the appropriate engineers who can answer the detailed questions.

Once all the appropriate resources are in place, the project manager is ready to have a positive kickoff meeting. The kickoff meeting should allow time for the team members to familiarize themselves with the other team members and their roles, to explicitly state which services are and are not included, and to determine what the communications plan will look like. Because those with escalation responsibility should be at the kickoff meeting, it is also a good time to review the escalation plan.

The bulk of the kickoff meeting, however, should be focused on aligning all the team members to what exactly will be delivered. Most project managers would like for the alignment portion of the kickoff meeting to go very smoothly, with the project manger explaining all the deliverables and few questions being asked. Although this is possible, especially if the project manager has aligned with the internal team on the customer's goals and expected outcomes, silence from the customer here should be somewhat alarming. As the lead of the delivery team, you are likely very familiar with what each deliverable accomplishes, but the customer team might be hearing of these deliverables for the first time and they are trying to align the deliverables with their desired outcomes. As they align the deliverables to their desired outcomes, this process often produces questions and sometimes conflicts between the teams on what exactly a deliverable is supposed to accomplish. Even though the conflict may be uncomfortable, especially as the team is just getting to know one another, conflict at this stage is a good thing. With all the appropriate resources on the telephone (the SOW negotiators, the project team, and the sponsors), now is the perfect time to address any concerns that arise. The SOW negotiators can step in and provide background on the pre-sales discussions and help inform your team as to what the customer is expecting. Most disagreements are able to be

quickly resolved because several levels of the escalation path are present. In the cases in which disagreements cannot be quickly resolved, the team is able to identify the problem early on and can begin to address the issue. Regardless of whether the issue is big or small, it is much easier to address it as the project gets started rather than as the project is finishing.

A prime example of this comes from my first project. With an engineering background, I was excited to begin the project management side of my career. I dutifully prepared the kickoff presentation and included each deliverable and a quick description of each. During the meeting, I walked through the deliverables and descriptions with little interruption from the customer, so I thought that everything was good to go. A few months into the project, we began delivering documentation that was not meeting the customer's expectations. These documents were similar to documents we had delivered before to many satisfied customers, but they were not accomplishing what this particular customer had hoped for. I can remember a conversation I was having with the customer's project manager in which he took a broad view and said, "Let's not forget what the project is trying to accomplish. We need to have a supportable system in the end." His point of view was that the deliverables were not aligning to his project goals, but I reminded him that we were trying to accomplish the larger project goals using the deliverables outlined in the SOW. In the end, our internal team made a business decision to over deliver and create unique documentation to support the customer's end goal, but the damage to our reputation had already been done. Had I been clearer or initiated more questions during the project kickoff, this conflict might have been avoided. If the team had realized at the beginning that the services we were providing were not going to meet the customer's needs, we could have adjusted the scope and avoided the customer's disappointment late in the project.

Face-to-Face Versus Virtual Kickoff

In our ever-expanding virtual workplace, face-to-face meetings are becoming rare. By communicating virtually, we are using the best talent, regardless of geographical restrictions, but the value of a face-to-face meeting should not be lost. Although not every project has the budget for travel, travel for the kickoff meeting should be made a priority. Even the relationships developed over a meal after the kickoff can provide the positive first impression that the team needs. The best example of this comes from my experience on a smaller project. Because the project was not that large, I decided that the team could conduct the kickoff meeting virtually. We had

a travel budget, but we had other trips for implementations that needed to be made, so I made the decision that the budget was best spent on the other trips. Several weeks into the project, we learned from the sales team that the customer was lacking the confidence that we understood his requirements and environment. We felt we were very aware of the situation, but decided that a face-to-face meeting was the appropriate response to the customer's concerns. It was somewhat surprising how quickly the customer's demeanor changed after we arrived on site. Since we were on a site visit, we were able to devote a focused six to eight hours to this particular customer and his network, as opposed to the one or two hours on a general conference call. We also took the customer to lunch and got to know him better socially. By the time we left the site that evening, the customer had an obvious change in confidence and believed we could deliver a quality project. If I had placed priority on a face-to-face kickoff, we would have avoided a few weeks of the customer feeling neglected and suspicious by instilling a feeling of confidence.

Face-to-face customer kickoffs are not always feasible, but they should be considered. In order to make a customer kickoff trip more desirable from a budget standpoint, consider combining the customer kickoff with other early-project activities, such as project planning, scheduling, or requirements gathering.

Gathering Requirements

After a successful kickoff meeting, the team needs to turn to gathering a detailed set of requirements from the customer. Although the kickoff provides a chance for the team to align on the high-level requirements, the details are also very important. For example, consider that in the kickoff the team agreed that they were going to create a wireless network at the customer site, but no other requirements were identified. The team spends a few months in detailed design and produces a flawless system that can support voice access for 200 users at one time. When they present the design, the customer informs the team that they need to be able to support 400 voice users at one time and also need the capability to stream video. Even though the team had created a perfect design in direct observance of the SOW, it was useless to the customer because the team did not understand the requirements.

Successful project execution requires successful requirements gathering. The requirements gathering will likely take up most of the team's time early in the project. This is not a time for the project manager to try to gather requirements on his or her own with the other project

manager. Engineers and subject matter experts will drive the requirements gathering details because they are the ones who, as in our example above, understand that a system is designed differently with 200, as compared to 400 voice users.

Each requirement needs to be documented, and each strategy used to fulfill the requirement needs to be included in the documentation. Once the customer and the project team have formally agreed to the requirements, the team can begin planning for project execution.

Transitioning to Project Planning

The importance of the first weeks of a project cannot be overstated. The project teams are beginning to make their first judgments, and creating an atmosphere of trust and goodwill will go a long way when the bumps come later on in the project. As project managers, it is our job to make sure that the customers and partners feel like they are getting the appropriate amount of attention and focus to make them feel confident in the project team and its goals.

Goodwill and a positive first impression are not the only things that need to be considered when kicking off a project. Team alignment is also a crucial function during the first weeks. Team alignment needs to come both in the high-level objectives and deliverables, as well as in the detailed requirements. High-level alignment most often comes from a properly prepared kickoff, which includes all the necessary project resources and focuses on the project's planned deliverables and outcome. After the team is aligned at the high level, it is time to get the engineers and subject matter experts on the team aligned on the detailed requirements.

Only after these steps have been completed can project planning begin with the appropriate confidence of project success. Transitioning to project planning will flow naturally from a proper kickoff, because the team will begin to focus on executing the defined deliverables and requirements. When the project has been kicked off properly, clarity and confidence will be the foundation for project success.

About the Author

Joel Prothro is an engineer-turned-project-manager currently working for Cisco Systems Advanced Services. His career goal is to "bridge the gap between engineers and normal people." He has worked to design and implement numerous Cisco technologies in many of the world's biggest companies in the energy, finance, retail, and healthcare industries.