



- A. Do you know your client/SME/reviewer(s)?
- i. Who is involved?
 - Does the client play multiple roles (e.g. both client and reviewer)? Is there more than one reviewer? Is there a single point of contact (SPOC)?
 - ii. How involved do they want to be?
 - The two extremes: micromanager (heavily involved), laissez faire (hands-off). Is this a client that wants to constantly be involved? Or is this a client that leaves the control in the developer's hands and only wants to be contacted if there is a question or issue? Most clients tend to fall closer to one extreme or the other instead of being in the middle. Determining the client's nature enables you to better manage expectations.
 - iii. Does the client have the same access to materials and tools that you do?
 - If either party has a limitation it needs to be expressed so that a compromise can be reached or an alternative can be explored.
- B. Does your client/SME/reviewer(s) know you?
- i. Who is involved?
 - What are the roles of each member on the development team?
 - Is there a SPOC?
 - ii. Be specific about the service you are providing.
 - Provide a clear, upfront definition about the role of each team member and the service provided as it can lessen confusion and ego-blow on the client side.
 - Also be clear about what services you can and cannot perform. Do not over-promise and under-deliver.
- C. Setting expectations: a two-way street
- i. Setting expectations of the developer
 - Set fundamental expectations such as agreeing to provide the service/product and following an established timeline
 - Consider intangible expectations such as making the client feel confident in your ability to deliver and satisfied in the service/product being offered.
 - Work to meet your client's personality type.
 - ii. Setting expectations of the client
 - Set fundamental expectations such as the client needing to provide access to required materials and resources.
 - Make it clear upfront how much time and effort will be required of the client, SME, and reviewer(s). This information coupled with the availability and personality type of each resource on the client side will have an impact to the project timeline.
- D. Changing/evolving expectations as a project nears delivery
- i. Scope-creep: the wrong way to manage changing expectations over time
 - Agreeing to make changes that fall outside of the scope impacts project timeline, cost, and overall expectations.
 - By allowing scope-creep to occur, the client may not understand why original milestones and delivery dates are missed.
 - ii. Change management: the right way to manage changing expectations over time
 - When possible instances of scope-creep arise, encourage the client to stick with set milestones so that delivery dates are not missed.
 - After delivery, work through an established change management cycle to add any additional deliverables/changes that the client requested late in the project.

Chris Denman has over 6 years of training development and leadership experience in the field of eLearning technologies. He earned a B.S. degree in Computer Science at the University of Cincinnati in 2002 and a Master of Technical and Scientific Communication degree at Miami University in 2004. Since 2005, he has worked at Atos Origin, a global IT services company where he has assumed the role of Business Process Lifecycle Management Training Lead and is responsible for the integration of business process modeling into end-user training