



Managing Stakeholder Expectations:

Aligning on Scope, Trade-offs, and Outcomes

QUIRK'S
MEDIA

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Key Takeaways



Align early on scope, trade-offs and outcomes to prevent misalignment, scope creep and false urgency.

Apply six proven and practical techniques for managing stakeholder expectations constructively throughout a project lifecycle.

Improve research and CI impact by strengthening stakeholder trust, insight adoption and decision confidence.

In One Word, Describe the Hardest Part of Managing Client Expectations



Why Should We Manage Expectations?



Avoid disappointment



Ensure the REAL project goals are met



Develop mutually beneficial relationships and respect



Provide consistent quality



Keep everyone sane



What Happens If We Don't Manage Expectations?



IMPACT TO YOU



Creates **chaos**



Damages **reputation**



Reduces **credibility**



Demonstrates lack of **professionalism**



Fosters **miscommunication**



Generates unnecessary **conflict**



Adds **stress**



IMPACT ON STAKEHOLDERS



Raises **uncertainty**



Injures **credibility**



Sets unrealistic **expectations**



Feels **frustrated**



Loses **trust**



Receives unpleasant **experience**



Stops using **your services**

Six Ways to Manage Expectations



1. Determine Needs and Project Goals



Gain clarity on the business problem to solve.



Provide context on what you seek to achieve.



Know key findings that will impact decisions and add value.



Be specific - avoid generalizations



Engage in dialogue with stakeholder



Action Steps



**Understand your
stakeholders**



**Schedule time to
talk with them**



**Build a
relationship**



CAN YOU FIND
WALDO ON THE
NEXT SLIDE?

YOU HAVE
1 SECOND!





2. Assess Project “Do-ability”



Not violating ethical and/or legal codes



Answers are not readily available



Do-ability percentage



Other things to keep in mind...





KEEP CALM AND BE DIRECT



Be up-front and a “straight shooter”



Under promise and over deliver

Action Steps



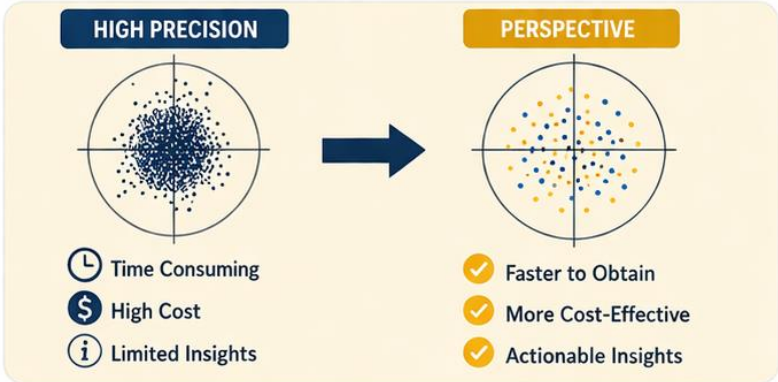
1. INFORM THE CLIENT

Inform client that their demand for precision can result in **little to no information** at all.



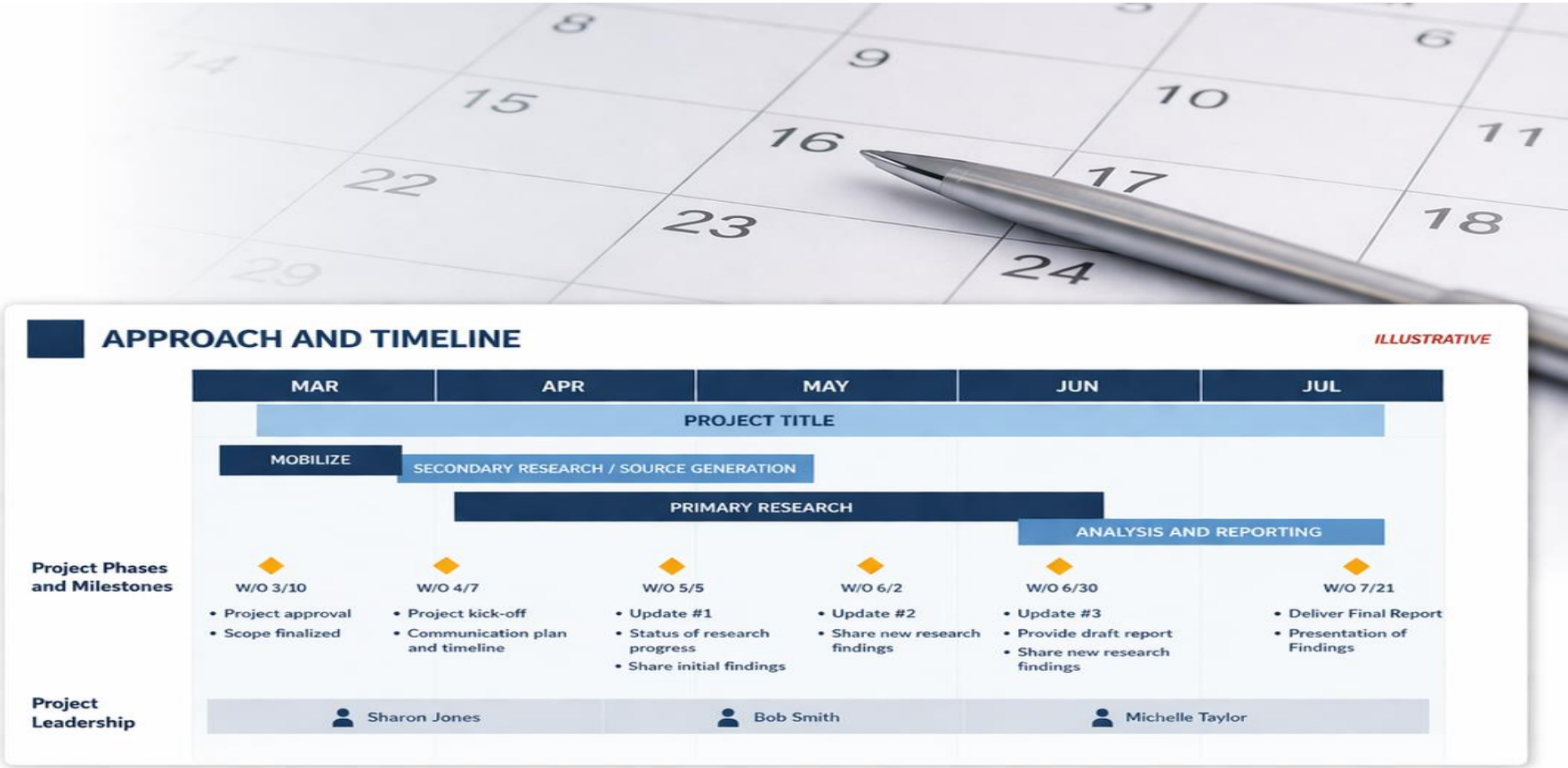
2. ILLUSTRATE THROUGH EXAMPLES

Illustrate through examples how perspective is **just as valuable**, and frankly **easier** and **more cost-effective** to obtain.



THE GOAL: BALANCE PRECISION WITH PERSPECTIVE TO DRIVE BETTER DECISIONS.

4. Create a Realistic Delivery Schedule



A CLEAR PROCESS. **BETTER OUTCOMES.**



Begin with the end in mind
(Stephen Covey)



Identify activities and tasks to produce desired results



Estimate how long it will take to complete those tasks



Know which tasks are dependent on others



Develop a schedule



Discuss with stakeholder

5. Communicate Regularly

Strong Communication. Stronger Results.



People get edgy and nervous



Reassure them



Don't ignore your clients



Avoid miscommunication



Action Steps



1. Conduct a project kick-off call/meeting



2. Understand desired communication frequency



3. Communicate as per clients needs



4. Develop communication plan



5. Provide status report – ask for feedback



6. Hold project wrap-up calls



7. Provide next action steps



6. Pick Two - Good, Fast, or Cheap

WE OFFER 3 KINDS OF SERVICES
GOOD • CHEAP • FAST



BUT YOU CAN PICK ONLY TWO

GOOD ✓	&	CHEAP ✓	<u>WON'T BE</u>	FAST ✗
FAST ✓	&	GOOD ✓	<u>WON'T BE</u>	CHEAP ✗
CHEAP ✓	&	FAST ✓	<u>WON'T BE</u>	GOOD ✗

Action Steps



Quality takes time. Let's find the right balance.



Emphasize that **quality takes time**



Ask for investment and **budget levels**



Determine what the real **drivers** are behind a project



“Help me to help you”

What Good Things Happen When We Manage Expectations?



Calm and order



Perceived as highly professional



Illustrate experience that builds credibility



All are on the same page



All clarification questions posed and addressed



Agreement on expectations

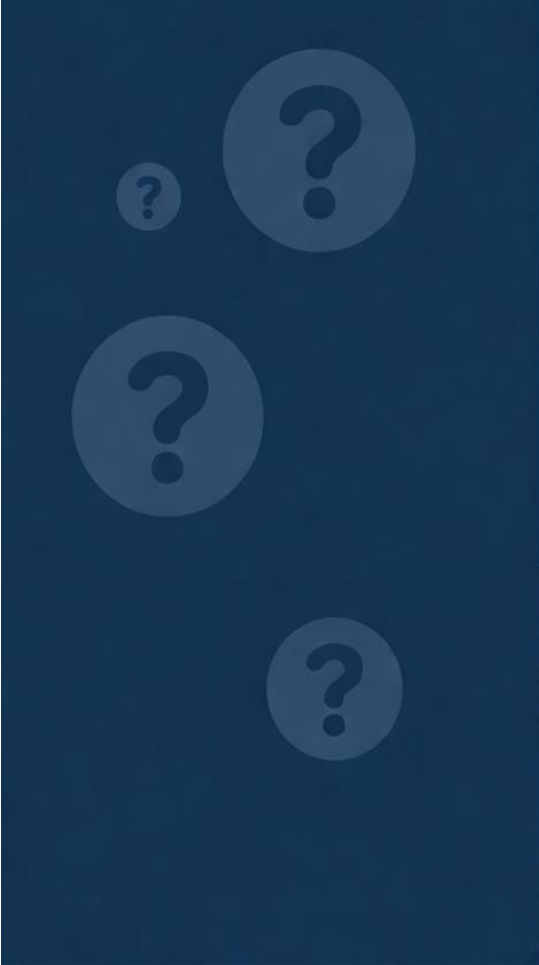


Positive experience



Happy client





Q & A



Recap: 6 Ways to Manage Stakeholder Expectations



01

Define Needs and Project Goals

Align on objectives, success criteria, and key outcomes.

Create a Realistic Delivery Schedule

Set clear milestones, timelines, and dependencies.

04



02

Assess Project “Do-ability”

Evaluate scope, resources, risks, and constraints.

Communicate Regularly

Share updates, address issues, and keep everyone aligned.

05



03

Seek Perspective, Not Precision

Use informed estimates to guide decisions, not false certainty.

Pick Two : Good, Fast, or Cheap

Balance trade-offs to deliver what matters most.

06





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