

Over-commitment – mismanaged expectations

Have you ever, in an optimistic moment, said yes to a client when you should have said no, or not yet?

Have you ever confidently agreed to do something you have never done before, with a rough guess at a timescale, plus a bit for contingency?

Leon Sadler, Consulting Manager of SAP makes a very telling comment on this subject: “Not managing your client’s expectations is a cardinal sin, if you are a consultant. You are the person who sets the expectations, not the client, so if you don’t meet them, it’s entirely your fault – no one else’s.”

We are at the core of the consultant’s world here. Expertise is all very well, but if you cannot set and manage expectations effectively, your career as a consultant is likely to be fraught with difficulty.

Simone is a young and inexperienced consultant, keen to impress. The short project is going well, and she is even a little ahead of schedule, although the client is not aware of this when he asks Simone to fit in just a small piece of additional work, Simone knows that this work is not in the original specification, but it seems a very small thing, a couple of hours at the most, so with time in hand, she readily agrees. It is not worth bothering with the change control procedure for this, she tells herself.

Sadly, Simone rapidly discovers that this is not a small thing. She struggles with it for three days, by which time she is well behind schedule. She finally tells her manager, who gives her the predictable response:

“Simone, you should never have agreed to this – it’s not a trivial task.”

“I know that now, Barry, but at the time it looked like a couple of hours work.”

“Never agree to anything outside of the specification without talking to me first.

You don’t have to say no to a client, just tell them you’ll check and come back to them. That’s not a difficult thing to say, now is it? The trick is to sound positive, but not commit.”

The most extreme case of this is a software company I know, who told me the story of one of their worst client nightmares. A bank had decided to do away with the debit and credit designations on one of their systems, and to have the negative figures shown in red. This seemed a simple change, and the project manager readily agreed, with no extra charge. What he did not realise was how deep in the code this change would have to go, and it took eight weeks of programming time to achieve it!

Why over-commit?

So why do we get this so wrong, so often, even when we are not under pressure from the client?

If this is a problem you suffer from, think about what it is that drives you to say yes, rather than no or maybe.

There are a number of drivers – let us look at the list:

1. Optimism
2. Inexperience
3. Lack of planning
4. Need to please
5. Need to prove competence

1. Optimism is an innate characteristic that some of us have, which is usually a blessing! In the context of project management it is a positive curse. Discipline yourself to come up with your natural optimistic estimate, then label it as such and add a factor – like two or three times, or add in lots of contingency. Create a formula and make it a habit!
2. If you do not have the experience, and simply do not know, then ask! Memorise the saying: “I think that might be possible, but I’ll need to check. Let me get back to you.”
3. Lack of planning is the easiest sin to commit of the five. Instead of listing all the details of the requirement and working through them to arrive at a time plan, you just take the main items, do an estimate and add on a bit. Perhaps you feel that the bit you add on is quite generous, and will cover it all, but in fact you may find that when you make a detail plan, you have used up your entire contingency and more. The rule is therefore to think through every element of the task, and time each one, and then add on a generous contingency. As a general rule of thumb, no task on its own takes less than half a day. This may all sound obvious in the context of producing a full project plan, but we are talking here about the additional requests, and the add-ons that people tend to ask for in a casual way, and we are therefore tempted to respond to just as casually.
4. The need to please will lead you down dangerous roads with clients. The way to combat this is think consequences. You may please the client now by saying yes, but that may mean making them unhappy later. So better to delay saying yes, so as to be sure that you will keep the client happy in the long term. Again, you need the words: “Let me just check and come back to you,” on the tip of your tongue.
5. If you are out to prove how competent you are, you will do better to think long term rather than short. This was part of Simone’s problem. Saying yes to the client made her look good at the time, but was it worth it when the client saw that she could not deliver? Simone had done double damage; saying she could do something when she could not, and failing to do it. She would have appeared more competent if she had said no in the first place.

The golden rule is to under promise and over deliver.

You may complete a project to the same standard in exactly the same amount of time. For the client that you over-committed to, you are late, and with the negative mindset that engenders, they will be looking for other faults too. On the other hand, with no change in performance, for the client you under-promised to, you are a star! Have that in mind next time you are tempted to say yes too quickly!

Part of this article appears in my book “[Consultant](#)” published by Hodder at £4.99