

Monitoring Expectations, Managing Clients

Presentation to Forest Estate Modeling Conference
Victoria BC. -- June 14, 2007

Douglas H. Williams, PhD
Partner, Cortex Consultants Inc.

Managing client expectations

Outline

- What do we mean by “client expectations” ?
- Client types and their special needs
- What can we learn from the Central Coast project?
- Collaborative approaches

What do we mean by “client expectations”?

Beyond Schedule A

- Are the project scope, budget, deliverables, schedule, client inputs and obligations clearly understood and documented?
- Do we understand the client's
 - objectives?
 - decision context and issues?
 - assumptions about scale?
 - values and “measures of utility” ?

Managing expectations

Formal project management methods ...

- Project monitoring and documentation
- change control mechanisms linking budget, schedule and deliverables

necessary ... but not sufficient

Managing expectations

The solution --

Relentless communication!

Managing expectations

Cortex' clients

Client type	"challenge"
Private sector/ private lands	 happiness
Private sector/ Crown lands	 OK ...
Public sector/ individual	  depends
Public sector/ committee	 danger
Public sector/ stakeholder group	 duck and cover

Central Coast Project

Many contracts, many clients

Study

Coast Information Team
Economic Gain Spatial Analysis

Analysis of the Impact on Timber Supply of the
CFCI/RSP Agreement

Analysis of the Impact on Timber Supply and
Critical Habitat of the Central Coast LRMP Table
Recommendations

Analysis of the Impact on Timber Supply and
Critical Habitat of the Central Coast LRMP
Government-to-Government Draft Proposed
Interim Legal Objectives





Central Coast Project Model – large and complex

- 1,789,029 ha productive forest land; 25% THLB
- 11 sustained yield units
101 landscape units
29 ecosystems
- goal programming objective function
- 1.3 GB matrix
- Remsoft Woodstock/LP and 64-bit Mosek solver
- 7.5 hours to generate, solve, report



Central Coast Project

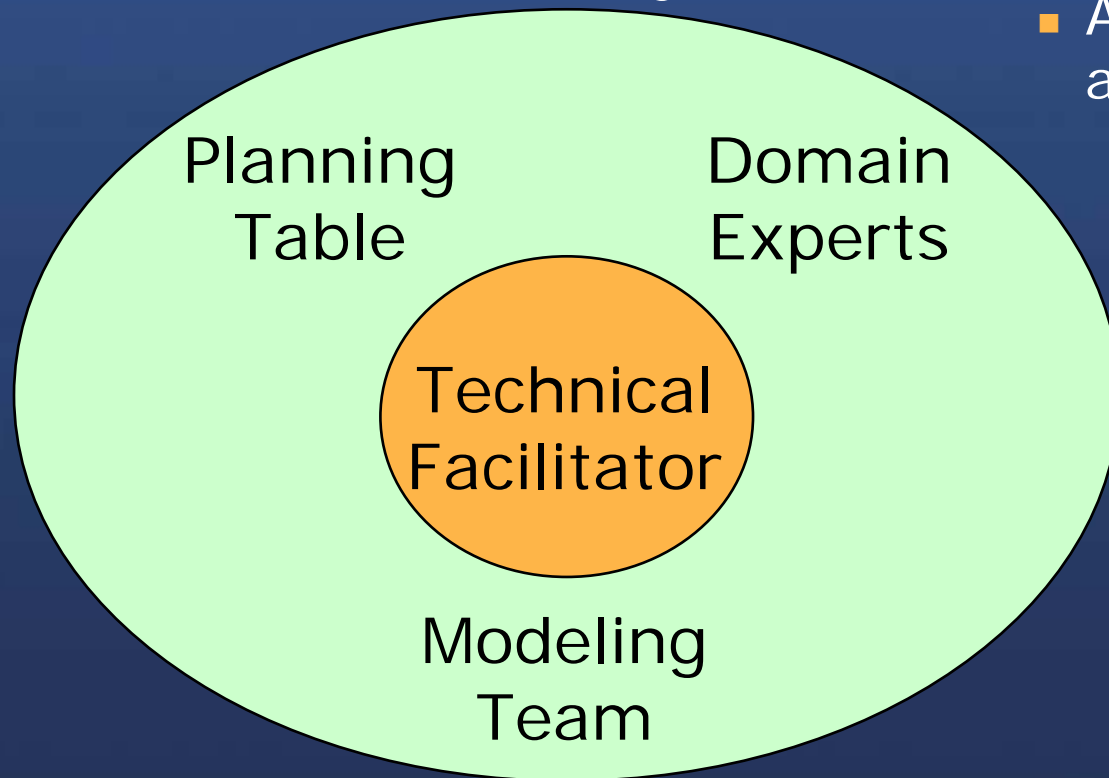
Many contracts, many clients

Study	Satisfaction
Coast Information Team Economic Gain Spatial Analysis	
Analysis of the Impact on Timber Supply of the CFCI/RSP Agreement	
Analysis of the Impact on Timber Supply and Critical Habitat of the Central Coast LRMP Table Recommendations	
Analysis of the Impact on Timber Supply and Critical Habitat of the Central Coast LRMP Government-to-Government Draft Proposed Interim Legal Objectives	

Project structure

Is there a better way ... ?

Collaborative Design and Analysis



- Current Projects:
Peace-Moberly Tract CIM
Klappan DST
- Andrew Fall, Don Morgan
and Dave Daust

Managing client expectations

Summary comments

- Good contracts
- Rigorous project management
- Communication

Project Governance and Structure

www.citbc.org

- CIT Experience: Recommendations on processes and structures for success (M.J. Hadley, 2004)

www.cortex.ca

- Managing for Science – Creating Conditions for Success (M.J. Hadley, 2006)