# CUSTOMER INTERFACING – LESSONS LEARNED

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## ABSTRACT

Customer interfacing is the process through which one works with and relates to their customer.  Often in the technical world, modelers find it easier to interface with computers rather than customers. It is not uncommon for those involved in the technical field of simulation to enjoy the more technical and analytical pieces of making a model.  Consequently, customer interfacing is not performed well.  Unfortunately, a valid model cannot be *ivory towered*.  One must consistently work *with* their customers to produce a valid representation of the customer's system.  This paper discusses a few lessons learned on interfacing with customers.  It presents 1)Some of the prime opportunities for customer interfacing during a project followed by 2)the habits of good interfacing.

## 1   EARLY PRIME OPPORTUNITITES FOR INTERFACING DURING A PROJECT (WHEN TO INTERFACE)

Every contact with even a potential customer should be viewed as an opportunity for building a relationship and improving customer interfacing.  Nonetheless, specific opportunities during a project's initial phase are critical to good customer interfacing.  These points are:

♦   During the determination of the project plan including the objectives, deliverables, and schedule,

♦   During the initial data collection activities (sometimes known as data collection workshops) to identify activity flows and associated data elements such as activity inputs, outputs, resources, and times.

Other times are important for good customer interfacing; however, if these early opportunities are not performed in a satisfactory fashion, ensuing opportunities will be difficult at best.

### 1.1  General Comments on Interfacing

The first opportunity for customer interfacing is in building a relationship with the customer.  Relationships often are a prime source for project work.  When a potential client *feels* comfortable with another person, they are more apt to desire their assistance in resolving difficult issues.  Trusting another's perspectives, ethics and professional capabilities will cause customers to request those individuals when they need help.  Some of the successful companies concentrate on customer relations before, during, and after projects even encouraging new managers to spend their first month developing relationships with their potential customers.  This is good advice that will help when difficult decisions are being contemplated on projects.

Specific interfacing opportunities are frequent during simulation projects.  Even though every contact with a potential customer should be viewed as an opportunity for building a relationship, this paper discusses interfacing as a part of the general simulation methodology and stresses points early in the methodology that require good interfacing.

### 1.2  Project Planning

Often, a project is "received" before a relationship is established.  In this case, the next  opportunity for interfacing is in helping a customer understand and articulate their expectations for a project.  This is a process of infinite skill and is valued after the fact by customers.  It is also an important step in managing the expectations of the customers.  Customers are not always able to fully express their needs.  General goals and objectives usually exist, however, specifics may not.  This is particularly true when a project has multiple customers.  For example, reaching consensus on project goals in light of multiple personal agendas is often the first real objective of a project.  The modeler will not necessarily fully understand the agendas at hand.  Nonetheless, gaining consensus from

the customers will be necessary to continue. In the same respect that conflicting metrics are not reconcilable with simulation, neither are conflicting agendas. On occasion, good modelers have occasionally spent a month getting the owner team in sync with each other in regards to the project objectives. It is a mistake to begin a project without consensus on the project plan.

The outcome of this process in an accepted project plan with definitive scope, metrics, and risks. The method in doing this is a series of individual and group meetings reviewing the project plan. By reviewing the project plan with its risks, goals, metrics etc, opportunities will develop to understand each individual's "perspectives" on the project. It is during this one-on-one time that the modeler begins to identify the project terminology as well as its deliverables.

Many of us have been given the charge to "fix" a given area. Management may even have given tacit recognition to process issues and may even suspect that individuals are the root cause of the problems. In this case, the charge is to truly identify the objectives and goals of the project. Metrics are extremely important to the modeler in this circumstance and will, as usual, save the day and this type of project as well. Identifying the *true* objectives of projects will lead to proper deliverables and assist the modeler in meeting the objectives of their customers. Good customer interfacing will assist in identifying the necessary information needed to produce a good project plan and its associated objectives and deliverables.

## 1.3 Initial Data Collection Activities

Modelers often state that simulation is as much art as science. The activities relating to gathering information from the customer is of the category combining art and science. The "science" aspects relate to the pure data issues. For example, many industrial engineering oriented modelers will build the time elements for activities as the subject matter experts (SMEs) describe the components of the activity under discussion. The "art" of this stage comes in building a relationship in five minutes or less with the SMEs and carefully soliciting sufficient information to determine proper distributions for the associated time elements. Without the necessary "art" to quickly build the relationship with the SMEs, the modeler may not adequately acquire information to determine the data aspects (science) needed for the activity time. Thus, simulation is truly the combination of art and science.

This "art" also includes the ability to relate to customers, understand their explanations of their systems, translate that information into useable process maps, relate the developed process maps back to the customers for validation in an understandable fashion, as well as obtain accurate process times from the subject matter experts.

The difference in just getting another data point versus representing the process in a valid and verifiable fashion understanding whether or not the stated answer is the best, correct answer requires the ability to read the customer, intuit their issues and apprehensions, while relating that data to the activity at hand. In short, a response is different than a valid answer. Although these abilities are learned by successful, seasoned modelers, many of these skills are identifiable and consequently transferable to less experienced modelers. The next part of this paper addresses some of the skills and habits necessary to successfully obtain process information.

## 2 HABITS OF GOOD CUSTOMER INTERFACING (HOW TO INTERFACE)

The important habits of good interfacing include the practices of:

♦ listening to your customers,

♦ translating their needs into realizable deliverables, and

♦ communicating in an effective manner with your customer so as to meet their intended goals.

These are also a good definition of managing the expectations of customers. Managing customer expectations is not the manipulation of customers or their objectives and goals. It is the "habits of good interfacing" as defined above. Naomi Karten in her book "Managing Expectations, Working with People Who Want More, Better, Faster, Sooner, NOW!" addresses three areas that effectively enhance and promote good customer interfacing. They are the areas of communication, information gathering and practices. Most problems in good interfacing or managing expectations can be eliminated or at least reduced with attention to these areas.

Karten mentions guidelines that apply well as habits of good interfacing. Many of the questions and statements that follow are from her book mentioned above.

**Guideline #1: Guard against conflicting messages**.

♦ Review your recent projects and determine the extent to which conflicting messages occurred. As well as possible, identify when and how the conflicting messages occurred. Determined how this can be avoided.

♦ Documents, procedures, in addition to face-to-face contact contain numerous opportunities to provide conflicting messages. Identify changes in these areas that can assist in keeping your actions in line with your words.

**Guideline #2: Use jargon with care.**

Terminology regularly is a source of misdirected intentions. Different individuals in similar industries often have unique verbiage associated with their own processes and companies. Consequently:

♦   Jargon should be specific to each project and not just loosely transferred between projects within similar industry groups.

♦   Confirm terminology at the beginning of a project before applying it in your interfacing opportunities with customers. This can be successfully done as part of the project planning documentation and amended as needed.

**Guideline #3: Identify communication preferences.**

Communication preferences reflect the styles through which individuals prefer to receive and give information. Some customers preferences include visual reports, detailed verbal updates, written summary reports, and concise written updates given weekly. Points to remember include:

♦   Identify your recent successful engagements. Determine the communication styles used by these customers during the project. Through this process, identify the communication styles with which you are most successful.

♦   Analyze and identify the communication preferences of your current customer base. Determine how you can adapt your communication style to ensure the best outcomes for the project.

♦   Remember that communication preferences can change during a project. Learn to identify when they have changed and modify your practices accordingly.

**Guideline #4: Listen persuasively.**

♦   Think about ways that you may have given customers the impression that you were not listening attentively. Identify those listening traits and determine changes in your own style that will improve your ability to listen persuasively.

♦   This particular guideline is difficult to improve by oneself in a vacuum. Consequently, one should seek the assistance of a mentor in improving this characteristic.

**Guideline #5: Help customers describe their needs.**

♦   Identify ways to give customers a chance to say "that's not it" and as a result, to better express what they want.

♦   Fully describe to the customer, their needs and process before building the model. This playback process allows them to hear and respond to your impressions. Their comfort level with the feedback will help the modeler gauge his understanding of the customer's system and needs.

♦   Identify a project in which customers insisted they knew what they wanted and you felt otherwise, and review how you handled the situation.

**Guideline #6: Become an information-gathering skeptic.**

♦   From previous projects, identify questions you wish you had asked customers that might have helped you avoid subsequent problems.

♦   Create a master list of questions to challenge your assumptions and those of your customers.

♦   As subject-matter experts (SMEs) describe activity times, determine what you feel their time will be for that activity. Compare your times with that of the SMEs. When the times are not consistent, the modeler should continue to probe the content of the activity until consistency is reached.

♦   Ask consensus-building questions. These include questions such as "Does this make sense to you?" or "Do you have any questions regarding the things we've discussed so far?"

♦   Ask more than yes or no questions. Open ended questions allow the modeler to elicit information that may be helpful in better understanding the process being modeled.

♦   Playback statements to ensure understanding. As stated in guideline #5, this allows the customer to confirm, correct, or add to the modeler's expressed statements.

**Guideline #7: Understand your customer's context.**

This is the process of gaining a broader picture of why the customer wants your assistance. A customer may want a specific issue addressed while, in reality, that issue is part

of 'larger' need. To help ensure your understanding of the customer's context:

- Review an experience in which you focused too intensively on the immediate situation and didn't adequately gain a perspective of the full context. Determine how knowledge of the full context of the project would have contributed to project outcomes.

- Prepare a list of information-gathering questions to guide you in broadening your perspective of factors that are effected by a given problem.

**Guideline #8: Set service standards.**

- Determine what customers can expect from you during their project. In a similar fashion, determine what you can expect from your customers. Ensure that both parties understand those expectations and will help each other meet those expectations.

- Review a situation in which effective service standards might have prevented problems from occurring.

- Use this information to establish service standards for your efforts.

**Guideline #9: When appropriate, just say "whoa"**

- Identify ways in which your service strategies may have led customers to expect more than you can reasonably deliver.

- Make a list of situations in which you might appropriately just say "whoa."

- Understand when saying whoa can hurt a project. For example, when funding and time is available for further work, saying whoa is not appropriate. In these cases, scope creep is acceptable and a good way to receive follow-on work.

**Guideline #10: Build relationships.**

Friends are more likely to give work to friends whom they trust personally and professionally. Finding ways to improve relationships always makes the work more enjoyable and will often lead to more work. To assist in building relationships:

- Analyze an experience in which you could have more effectively served a customer if your relationship had been stronger.

- Formulate ongoing methods for strengthening relationships with your customers, including at least one customer who is often viewed as difficult.

- Observe those in your opinion, that are able to build strong relationships. Incorporate their attributes that are compatible with your own style.

## SUMMARY

A common saying is "If it weren't for my customers, this job would be fun." People tend to fault their customers for having unreasonable or unrealistic expectations when in fact, customers are the source of our employment. We all interface with our customers. Interfacing well ensures that our customers know our intent is to help them know and meet their needs, and to build a valid model. Good customer interfacing helps in meeting those goals.

## REFERENCES

Karten, Naomi. 1994. *Managing Expectations, Working with People Who Want More, Better, Faster, Sooner, NOW!* New York: Dorset House Publishing

## AUTHOR BIOGRAPHIES

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