

# Customer Interaction Patterns

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## Abstract

With the increasing emphasis on business awareness, we are all asked to play a more active role in interfacing with customers, both internal as well as external. This new role poses a challenge for those of us who may need guidance to improve their effectiveness in customer interaction.

Who is the customer of an IT professional? We say the customer is anyone to whom the professional makes a value-producing promise. This applies not only to the ordinary notion of someone purchasing a product or a service but also to users of software systems, to clients of IT professionals, to students of IT teachers, and team members with each other and their team leaders. [Denning+01]

As Gerald Weinberg [Karten94] has noted: How could an industry as large as the information industry get so far removed from its customers? As industries go, we are large, but we are new. In our short history, we've seen numerous cases of systems development in which a job estimated at ten thousand dollars wound up costing a hundred thousand dollars. We've asked for a two-page report on sales of steak and gotten a thousand pages on sales of everything from hamburgers to steers. Our customers expect little from us, or expect the wrong things, and in this they're not disappointed. We thought that as our technical prowess grew, our customers would be happier, but they aren't. To match our increasing ability to produce excellent systems, we need to increase our ability to manage our customer's expectations.

## Introduction

An early version of the patterns was workshopped at PLoP '97. After several internal workshops and updates, a later version was workshopped at PLoP '98 and published [Rising99].

At ChiliPLoP 2002, Terry Fujino, Takako (Tina) Nakatani, Mari Sakuri and I mapped out the organizational world that interfaces with the customer. It includes: the customer, the enterprise level, and development. The relationships involve expectation management among all three. Several new patterns were developed: Bad News Early, Goal, Meaningful Meetings, Own the Problem, Relevance Testing, and Skinny Chicken. Some of these were workshopped at ChiliPLoP with special guests: David DeLano, Karen Hanmer, and Eugene Wallingford, and have been added to the collection.

The patterns have all been re-written in pseudo-Alexanderian format: the name is followed by a metaphorical story, then the context, problem, forces and rationale, problem statement and resulting context. Known uses are described at the end. Some of the older patterns have been given new names: *Customer Understanding* was *Know the Customer*, *Effective Listening* was *Listen, Listen, Listen*; *Trust Account* was *Build Trust*; *Timely Response* was *Be Responsive*; *It's Not Just the Meeting* was *Customer Meetings: Go Early, Stay Late*; *Personal Integrity* was *Show Personal Integrity*; *Customer Relief* was *Take Your Licks*; *Within the Lines* was *Be Aware of*

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*Boundaries; and Good Manners was Mind Your Manners.*

<b>Pattern</b>	<b>Intent</b>
<i>It's a Relationship, Not a Sale</i>	Develop a relationship with the customer. Focus on this relationship, not the current transaction. Use: <i>Customer Understanding</i> and <i>Trust Account</i> .
<i>Customer Understanding</i>	Learn as much as possible about the customer. Use: <i>Effective Listening</i> , <i>Timely Response</i> and <i>It's Not Just the Meeting</i> .
<i>Trust Account</i>	Every contact with the customer is a chance to Trust Account. Take advantage of it. Use: <i>Effective Listening</i> , <i>Timely Response</i> and <i>It's Not Just the Meeting</i> .
<i>Effective Listening</i>	Listen to the customer with intent to understand. Use <i>Personal Integrity</i> , <i>Within the Lines</i> , <i>Customer Relief</i> , and <i>Good Manners</i> .
<i>Beautiful Termination with Satisfaction</i>	When a relationship built on trust has been established with a customer, you can end agreements without rancor.
<i>Timely Response</i>	When you receive a request from the customer let the customer know you received it and how you plan to resolve it.
<i>It's Not Just the Meeting</i>	Arrive at meetings early enough to meet other attendees and spend time socializing. After the meeting, allow a little time to talk to others with common business interests.
<i>Personal Integrity</i>	Don't withhold important information from the customer but stay <i>Within the Lines</i> .
<i>Customer Relief</i>	Don't argue. Try to understand how the customer's business is impacted. Don't try to appease the customer by making promises you can't keep. Stay <i>Within the Lines</i> and use <i>Good Manners</i> .
<i>Within the Lines</i>	Treat every conversation with the customer as part of a negotiation. Don't discuss commercial considerations, e.g., price, cost, schedule, and content that aren't part of your responsibilities. Use <i>Good Manners</i> .
<i>Good Manners</i>	Be polite. Dress appropriately to meet customer expectations. Show respect for everyone, including competitors. Be careful in interactions with others in front of the customer.

<i>Skinny Chicken</i>	When you know well in advance that an end date cannot be met, identify the subset that is most important to your customer and deliver that functionality early.
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Table 1. Customer Interaction Patterns

### ***It's a Relationship, Not a Sale***

*Feargal Quinn, founder of Ireland's chain of Superquinn markets, grew up spending school breaks at his father's Red Island holiday camp. His father charged guests up front for their entire holiday. "It was set up so that no matter how hard we worked to give our guests a great experience, we wouldn't increase our profit from their stay," says Quinn. "The only way we could judge our success was if the guests said, 'I had a great holiday. I'm rebooking for next year.' Every thing we did was centered on one overriding aim: to get people to come back. I learned that if you look after getting repeat business, profit will largely take care of itself. When faced with any business decision, any call on your time or resources, ask, "What will this do to help bring the customer back?" [LaBarre01]*

You currently play an active role in interfacing with customers or you have been asked to take on this role. *Customer Rapport* (develop a rapport with the customer) [Whitenack95] and *Engage Customers* (closely couple the customer role to the Developer) [Coplien95] define the context for this pattern.

### **You want to delight your customers but also protect your own interests.**

When you need a customer contact, you may just want a name and a phone number. Just having a person to call is not enough; a relationship with the customer gives the results you want.

The relationship with the customer is like a dance. You take steps, the customer takes steps in response, and then you take more steps. You must be focused on the flow of transactions, on the overall pattern and direction, not merely on the current transaction. Human relationships are fragile and not formed instantly but develop slowly and evolve over time. In business, as in life, it takes a long time to make friends. [Kohn97] It's easier to build a relationship than to re-build a relationship. Don't assume that a relationship is static. It must be supported and maintained over time.

The quality-satisfaction gap is not about products. It is about feeling. In a culture where you are bombarded every day with advertisements, objectives and incentives, where someone is always after your hard-earned money, you just want to know that if you buy their goods, they will care once the sale is over. You want someone who cares and will take action. Caring can't come from a total quality improvement team, reengineering, just-in-time or any formula, objectives, or consultants. Customers are human and companies are just collections of humans. [Behymer97]

Because of the clutter of offerings in the marketplace, companies need more than customer awareness or a superficial connection, they need to connect on a deeper level. They need to

respect and acknowledge the customer's emotions—feelings such as the yearning to belong, the hope to transcend, and the desire to experience joy and fulfillment. Smart companies recognize that great products and services can deliver more than profits; they deliver experiences that make life better in some small way. [Bedbury02]

*Therefore:*

**Develop a relationship with the customer. Focus on this relationship, not the current transaction.**

Develop *Customer Understanding* and use that understanding in your product as part of an on-going commitment to build a *Trust Account* with your customer.

As you begin to give it your attention, tell your customers that you are paying more attention to expectations management and discuss how you can jointly improve your ability to work together. Just raising and discussing the subject can improve your ability to meet each other's expectations. Two important aspects of the customer relationship will emerge in these discussions: first, the extent to which you and your customers already share similar views; and second, the extent to which you misjudge what is important to your customers. [Karten94]

Your customers will feel they're buying into a relationship, not just buying a product. Your customers will feel like staying with you. Your customers will sense that you are going somewhere together. A long-term relationship means repeat business. It's much cheaper to keep a customer than to find a new one. Valued customers feel that their relationship is a personal one. When you make each customer feel special, valued and listened to, and they will remain loyal and likely increase their business with you.

Be careful or the customer will become too dependent on you. As a result of a close relationship with the customer, you will be the one the customer turns to. You will be the one who gets all those late night phone calls, those last minute requests for urgent fixes. Everyone on your team must practice this pattern; it's not just a job for one person.

*Our customer knows that this is a new product. They've been great about taking releases that are not perfect and working with us to get the product where it should be. We need customer feedback in the iterative development approach we're taking. [AGCS]*

*The customer pulled us into the market. We didn't know much about it and the customer was also learning. We followed the customer and just let them lead us. [AGCS]*

*Now that the system is up and running, they are monitoring the system and alerting me if things don't look right. This wasn't a matter of installing the system, leaving, and now we're on our own. I feel like I have their support on an ongoing basis. [Inside98]*

**Originator:** Jim McCarthy [McCarthy95].

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## *Customer Understanding*

*When it comes to getting a feel for the customer, nothing beats “jumping the counter.” Each month, managers of Ireland’s Superquinn Markets are required to spend time “in the customer’s shoes” (shopping, asking questions, lodging complaints, waiting in line). “The difference between being a customer yourself and waiting on a customer is amazing,” says founder Feargal Quinn. “What seems reasonable or even valuable from the perspective of the company is often glaringly wrong from the pint of view of the customer.”*

You understand *It's a Relationship, Not a Sale.*

### **You feel that just knowing your product is enough.**

It's not enough to ask customers, "How are **we** doing?" You have to ask, "How are **you** doing?" You need to understand your customer's wants and needs. If you really understand, you'll be able to apply your expertise to meet the needs they express and some things they may not even know they need. [Guaspari98]

The question "What are your requirements?" is the wrong question. The right question is "What is your world?" Once you begin to understand your customers' organization, their concerns, and their way of working, it becomes much easier to understand their requirements. To understand their needs, understand their culture, their hopes, and their expectations. Know your customers as people first and customers second. Understand your customers and you'll understand their expectations. [Thomsett97]

Knowing your customer's products and services and how the customer gets these products and services to market helps you understand how the customer thinks from a business point of view. If you think about the customer's needs instead of your own, the business will take care of itself. Understand how your customers make money and help them make more and your income will take care of itself. Helping your customer succeed is a sure way to success.

*Therefore:*

### **Learn as much as you can about your customer to understand their needs.**

Help the customer and the customer's customers succeed. Learn the "inside" of the customer's business and the "far side," (the users and vendors whose products must work with yours). Understand the needs and drives of all customers along the customer chain, from intermediate providers to ultimate users.

See your customers as people, human breathing beings; listen to them; talk to them, and study them so you can anticipate what they'll want next even before they're aware of it. [Covey89]

There is no substitute for an on-site visit. See the customer's world and the problems they face. One trip is worth hours of brain storming about the customers' needs. Get hands on experience in the customer environment. Some customers will allow you to visit their site and take notes while people use your product. Customers can also provide documentation for their business processes.

Provide customer interaction at an appropriate level. A vice-president feels more comfortable talking to someone at a higher level, while engineers want someone who knows low-level

details.

If the customer does not speak your language (technical, lingual), learn at least some of the customer's language.

Use *Effective Listening*, *Timely Response* and *It's Not Just the Meeting*.

When you understand the customer's world, your products become more useful. Understanding the world of your customers' customers helps ensure that products integrate properly for the customer. When you understand your customers' values, you become an extension of their enterprise.

Understanding the customer enables a better understanding of customer priorities. This can be valuable if a trade-off between schedule and functionality must be made.

Applying this solution is not as easy as it may sound. Company culture and politics may be beyond your understanding. This is an on-going task; our environment and that of our customer continually change. Our organization and the customers' organizations are "many-headed beasts" and present different views to different people at different times.

*If you know someone, they'll do anything for you. You can call them in the middle of the night. If you don't have a relationship like that, you have to follow an official path and it takes longer.*

[AGCS]

**Originator:** Rod Veach

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### ***Trust Account***

*A customer at a remote site called up with a problem. I tried to reproduce the problem but everything worked fine here! We talked on the phone as I entered the commands. They swore up and down that they had followed the User's Guide. Something didn't seem right. I knew Stan Ricksecker had a good relationship with the customer, so I asked him to help me. Minutes later, Stan told me they were afraid they would have to pay for a fix if they admitted that everything they had done wasn't as documented in the User's Guide. Once he found that out, it didn't take long to find out they had used the wrong command. The fix was easy and provided without cost. The relationship Stan had with the customer and their trust in him could not be replaced by my knowledge of growth processes or anything else. [Kromrie-Williams]*

You understand *It's a Relationship, Not a Sale* and are trying to develop *Customer Understanding*.

### **You want your customers to trust you.**

If I make deposits into a *Trust Account* with you through courtesy, kindness, honesty, and keeping my commitments to you, I build up a reserve. Your trust toward me becomes higher, and I can call upon that trust many times if I need to. I can even make mistakes and that trust level, that emotional reserve, will compensate for it. My communication may not be clear, but you'll

get my meaning anyway. When the *Trust Account* is high, communication is easy, instant, and effective. [Covey89]

Clients prefer to do business with people they like, with people who seem genuinely interested in them, who deal with their concerns. The worst customer interaction mistake for some customers is to get right down to business, while others do not want to waste time on preliminaries. It's extremely important to develop *Customer Understanding*. The most critical result produced during an initial meeting is to begin to add to your *Trust Account*. [Hunter98]

People buy products from people. All things being equal people will do business with people they like. All things not being equal, they still will! [Edler95]

*Therefore:*

**To earn the customer's trust, make promises and keep them. Trust grows over time in small, incremental steps.**

Not calling is not caring. Stay in touch. Customers need to see and hear from you. They need to know how much you care. [Edler95]

Use *Timely Response* and *It's Not Just the Meeting*.

As a trusting relationship is established, customer interaction becomes easier, questions are answered, problems are solved, and progress is made.

*Steve Holm had been working on ATIUM View for some time when he was transferred to another project. Steve had a good working relationship with our customer. Steve informed the customer about the transfer but promised to see the work through until the network was turned up (4 months in the future). Steve attended meetings and fielded calls from the customer, but then passed the requests along to me and others—the Facade pattern? The customer was happy because Steve's project move was transparent to them. It worked nicely for me, too, because Steve passed along information to help me so I didn't have to tackle the requests cold. [Grover]*

*Customers usually don't want too many contacts. They just want to interact with one person. [AGCS]*

**Originator:** David Saar

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### ***Effective Listening***

*It wasn't the first time I'd listened to a customer, and it wouldn't be the last. Virtually every product evolved from discussions with and suggestions from our customers. In years to come we even involved them in the design stage, asking what they thought the product should do, how it should work. [Kurtzig91]*

You understand *It's a Relationship, Not a Sale*. You are trying to develop *Customer Understanding* and build a *Trust Account*.

**What people say is often open to misinterpretation. Sometimes what they say isn't what they mean.**

"Seek first to understand" involves a very deep shift in paradigm. We typically seek first to be understood. Most people do not listen with the intent to understand; they listen with the intent to reply. When I say empathic listening, I mean listening with intent to understand. I mean seeking first to understand, to really understand. Empathic listening gets inside another person's frame of reference. You look out through it, you see the world the way they see the world, you understand their paradigm, you understand how they feel. [Covey89]

Listening is the most difficult skill to learn and the most important to have. Learning how to listen and really hear what people are saying can make all the difference. When you listen well you hear: What customers say and what they really mean. What your customers are really looking to achieve, including hidden agendas. What your customers think is important. Spend twice as much time listening as talking. [Edler95]

*Therefore:*

**Listen, really listen, to your customer. Ask lots of questions and spend more time listening than talking. Give them room. It may not be until the tenth sentence that the customer says what they really want.**

Be genuinely interested instead of using the time to prepare your response. Follow their agenda instead of interrupting or going off on tangents. Be flexible and positive, with an agreeable, winning attitude.

If you're too anxious to please, you may speak out of turn. Let the customer talk. If you cut them off too early, you'll miss their meaning.

Sometimes you need to hear what isn't said to learn what the customer is thinking. Sometimes you need to push for more information. Ask probing questions. Ask them to draw a picture!

Listening and appearing to listen can be two different things. Some people listen well while staring into space, which can be disturbing to someone who expects you to make eye contact. Some people doodle or take notes while listening, which can be upsetting for those who want your undivided attention. If you don't have sufficient *Customer Understanding*, ask about personal style issues, even if a customer doesn't have any quirks, he will appreciate being asked how he feels.

Show *Personal Integrity*, don't make commitments outside your area of responsibility—stay *Within the Lines*, and use *Good Manners*.

Nothing replaces listening to your own customers firsthand. Not only will you find out what you're doing right and wrong, you might just pick up an idea for a brand-new product or business. [Mariott97]

The customer will feel valued, that concerns are being heard and issues addressed. More than this, the customer's needs really will be heard since you will really be listening.

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Listening is only one part of building a trusting relationship with the customer. In isolation it will not work. It must be part of an overall customer interaction strategy.

*A sales manager at Armstrong International wanted to add an obsolete feature to the division's new fish finder. This approach contradicted company strategy—always provide the latest and greatest technological advance. The sales manager wanted to add a simple flasher to a product that already provided information on the location and size of the fish. No one could understand why the simple indicator would be useful. The sales manager pointed out that many longtime customers were not comfortable with the new, computerized technology and wanted the simple interface they were used to. [Armstrong92]*

*One of our quality measures dealt with response time to user problem calls. A call had to be responded to within an hour. The support person had to call the user to get any further required detail and let the user know that we were working on the problem. This was a feel-good measure to let the customer know we cared. Systems were put in place to notify us when a call was received, and when the return call was made. However, the customer wasn't interested in the call-back. They wanted their problem fixed! And they told us that in various forums. Well, we weren't measuring that!*

*In late 1997, Yellow Freight surveyed 10,000 randomly selected customers. Since then, the company surveys 600 different customers a month. Those 15-minute conversations are vital. For a company that relied on internal criteria, letting people from outside, its customers, evaluate performance wasn't easy—especially when Yellow learned that its assumptions about customers were wrong. "We thought speed and price were the most important things," says Greg Reid, senior vice president. "But according to our research, what matters most is that you pick up when you say you're going to, deliver when you say you're going to, and don't damage the freight." Customers who said that they would use Yellow again and recommend it to others had gotten good service. Those who hadn't were less loyal. It was a fairly obvious lesson for a traditional service provider, but it was a critical one for a company that was trying to become customer-centric. "What happens when consumers anywhere get bad service? They don't come back," says Reid. [Salter02]*

**Originator:** David Saar

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### ***Beautiful Termination with Satisfaction***

You have already established *It's a Relationship, Not a Sale* through several interactions with your customer and the products and/or services you have provided as a result of those interactions. This has also enabled project members to build a *Trust Account* and *Customer Understanding*. However, the business environment changes so rapidly that some of the customer requests require too much effort and you realize that it would be impossible to meet the customer's expectation within the specified budget and/or time schedule. Team members are honest enough to show *Personal Integrity*.

**It would be easy to simply continue the current situation with your eyes closed, but it might**

**result in failing to meet the customer's expectations.**

Once we have an established relationship, inertia sets in and we tend to continue as we have in the past. Everyone wants to be satisfied no matter what path the relationship takes. Moreover, making a negative decision is hard, especially when it might risk an established relationship and further business opportunities.

Dwyer has identified five stages of buyer-seller relationships. [Dwyer97] Dissolution is independent of these and can occur in any stage. Other models can be found in [Wilson99], [Warsta02].

1.	Awareness
2.	Exploration
3.	Expansion
4.	Commitment
5.	Dissolution

Dissolution that occurs earlier than stage 3 could not be beautiful, since a relationship and cooperation have not been well established and a *Trust Account* could not have been built. Trust in a relationship is built over time; close and continuing relationships are seen as vital to building trust [Young91]. According to a definition of trust as “a willingness to rely on the behavior of an exchange partner in whom one has confidence,” [Moorman93] it can be seen that dissolution would be applicable only in stage 3 or later.

**Be honest yourself and convince all stakeholders, especially your customer, that the termination of the relationship is the best way to retain the shared goals and benefits both sides have enjoyed. Good medicine tastes bitter, but you still have to take it. Since you have built a good relationship with your customer, your customer will trust you and understand what you intend to do. Such a termination is a *Beautiful Termination with Satisfaction*.**

Even a negative decision, if it is done with careful consideration, could be a fruitful one that prevents the stakeholders from suffering the damages caused by continuing the current agreement. All stakeholders can be satisfied with the mutual goals and benefits they have obtained, and the agreeable termination of the relationship allows the company to re-build the relationship again with the customer in the future.

A *Beautiful Termination with Satisfaction* makes it easier for all stakeholders to rekindle the relationship built on trust at some future time.

*Two years ago, Nissan, one of the major car manufacturing companies in Japan, had been doing poorly in business. To overcome hard times, the CEO had decided to implement a crucial*

*curtailment, including a large cut back on personnel. Last year, Nissan has achieved the first goal they had promised and also demonstrated their successful recovery from the critical phase. Later, they started to recruit the experienced personnel they had once dismissed from the company, with better treatment than before. Many experienced engineers have been happy to re-join the company, holding no grudges, since the cut back was probably the only chance for them to overcome the difficulty they were facing at that time, and realize today's success. A Japanese newspaper created the term "V-letter recovery" to represent this kind of quick recovery.*

**Originator:** Tina Nakatani

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### ***Timely Response***

*As one company built a closer relationship with a customer, systems staff were surprised by how strongly their customers wanted not instantaneous service, as was expected, but simply to be kept informed on a timely basis. [Karten94]*

You understand *It's a Relationship, Not a Sale*. You are trying to develop *Customer Understanding* and build your *Trust Account*.

**Nothing annoys customers more than believing you're not responsive. It doesn't help to be working hard on their behalf if you don't let them know what you're doing.**

People don't like to be ignored, and that includes customers. You want to be attentive to your customers, but you can't always give an immediate response. Sometimes you may be away from the office or the system may be down.

*Therefore:*

**Return customer calls or e-mails the same day, even if you know the customer will have already left the office.**

Never let the customer wait more than a week for a response on anything. When you receive the request, contact the customer to say you received it and how you plan to resolve it. If you can't get final resolution in a week, contact the customer, and say what you have done so far.

Sometimes you must get back to customers immediately and try to complete requests in a day. Always ask customers, "What is your deadline?" to determine an appropriate response time.

Have a message on your voice mail and autoreply on your e-mail if you are out of the office. This notifies internal as well as external customers if you're away and whom to contact in your stead.

Don't let your enthusiasm for a quick response lead you to overpromise. Show *Personal Integrity*.

Keeping customers informed of your progress on a request lets them know you are taking the request seriously, that action is being taken. Customers will feel you have their best interests at

heart.

*Always remember to acknowledge voice mail or e-mail. Just say, "I got it!" [AGCS]*

*A customer called and asked if we would be interested in quoting price/delivery for a new product. I got details on the project and within 2 days provided them with a quote. Over the next week, I spent time getting to know the customer and telling them about our services. When I asked when they were going to make a decision, I was told they were leaning toward accepting our bid but had to wait for a reply from another company. They had given the other company the opportunity to bid this project 2 weeks prior to giving it to us. Overall, it took the other company about a month to get back to them with a quote. Once we were awarded the business, it took about 2 weeks to get a signed contract. This was the start of a great relationship with this customer. We delivered 30 days early with 0 defects. The main reason the customer went with us was because they felt comfortable with us every step of the way. [Davis]*

*A remote site was experiencing database problems that were interfering with providing certain services to the customer. All attempts to recreate the problem using our interactive simulation tool or the prototype failed. We had an entire week's database changes shipped to us. Using the same load they had, I tried to recreate the problem by entering an entire week of the same commands, which took several days, working day and night. During this time, the customer received no word from us. Finally, the customer called and wanted to know what was going on. By this time, all the commands been entered and everything looked like it worked fine. We decided to do an audit of their patches and found several that were missing. Our customers are very knowledgeable. I wish I had kept them more informed. We might have come up with the idea of the patch audit sooner. Certainly they would have felt more involved. It's too easy to be on one side of a problem and not benefit from expertise on the other side. Keeping the customer informed is only one of the many lessons I learned from this experience, but one of the most important. [Kromrie-Williams]*

**Originator:** Linda Leonard

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### ***It's Not Just the Meeting***

*There is a legitimate social component to meetings. Sure, we'd all rather spend our time on real work than idle chitchat. But you should never overlook the social side of work rituals—even in meetings that are all business. In many of the meetings I run—especially meetings that take place early in the day—I schedule 5 or 10 minutes of open time, just to encourage people to relate to one another. If you plan for such time, if you put it on your agenda, then you won't feel you're not doing what you ought to be doing. Instead, you can enjoy going around the room and asking people what they did last night or over the weekend. [Imperato99]*

*You understand It's a Relationship, Not a Sale. You're trying to develop better Customer Understanding and build your Trust Account.*

**You have to attend customer meetings and find them a chore. You're not getting anywhere building good customer relationships at these meetings. Often team members arrive just as the meeting starts and leave as the last slide is presented.**

You want customers to be aware of the current status of the product. Some people feel that social interaction (especially meetings) is lost productivity. Even those who aren't rabid meeting-haters still have too much to do and too little time in which to do it.

There are many meetings whose real purpose is to get concerned parties together. The announced purpose may be to hear status information, but the true benefit is the personal exchange that happens around the meetings. Spending a little time socializing beforehand allows everyone to come to the meeting with a sense of camaraderie, which makes the meeting more effective. That, in turn, makes the time after the meeting more worthwhile. Often a post-meeting gathering is where the real work is done.

*Therefore:*

**Arrive at the meeting with enough time to meet attendees you don't know and renew old acquaintanceships. After the meeting, allow a little time to talk to others with common business interests.**

If you are holding the meeting, plan for the pre- and post-meetings but keep it as short as possible. Don't lose your sense of the time constraints of the customer and your team members. We are all under time pressure, so a fine balance is required to convey the right message to our customers.

When you show up a little early, this allows the meeting to start on time and sends a message to customers that you value their time.

The extensions before and after the meeting more than justify the routine occurrence of the meeting itself, which becomes a shared experience instead of an obligation. A perfunctory or routine meeting becomes a positive experience that builds the *Trust Account* and solves real problems.

This pattern has broader implications than customer interaction. As companies include more telecommuters, there is the increasing loss of visibility to these employees. This can be harmful both to the worker and the company. The employee feels removed from team interaction and the company loses sight of the employee's contribution. Taking a little time before and after the meeting can make a tremendous difference in the lives of those who are not physically present for the meeting.

*Our group had a "meeting rep" who volunteered to go to all meetings to represent the group and save time for team members. It sounded like a great idea. The volunteer was well intentioned and was sincerely trying to save effort for the team. The result, however, was a real loss of visibility by the team. No one else was part of interface meetings, so they had no input to agreements and misunderstood some requirements, but the real impact was to the team's visibility to the rest of the project. Team members missed valuable networking*

*opportunities and visibility to project management.* [Kromrie-Williams]

**Originator:** David Saar

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### ***Personal Integrity***

You understand *It's a Relationship, Not a Sale*. You are trying to develop *Customer Understanding* and build your *Trust Account*.

**You want to be honest with your customer, but you don't want to look bad.**

Failure to describe your situation accurately can erode your *Trust Account*. Part of an honest relationship is sharing bad news. Some problems go away on their own, while others escalate. In the early stages, it's hard to tell the difference.

Integrity includes but goes beyond honesty. Honesty is telling the truth—conforming your words to reality. Integrity is conforming reality to your words—keeping promises and fulfilling expectations. Lack of integrity can undermine almost any other effort to build a *Trust Account*. People can seek to understand, remember the little things, keep their promises, clarify and fulfill expectations and still fail to build reserves of trust if they don't show integrity. [Covey89]

*Therefore:*

**Stay *Within the Lines*. Don't share information if there is no compelling need. The customer doesn't need to hear every little problem, just the major impacts. Always disclose something that would bother you, because it would probably bother customers, and if they found out, they'd wonder what else you were hiding.** [Kohn97]

Tell the truth. Don't lie, don't deceive, and don't overpromise. Honest communication means being open. Withholding important information is not honest. Customers who believe you won't lie about a situation still will not trust you if they believe you are not telling them the complete story.

Simply being honest is not the intent of this pattern. Some kinds of honest comments can be destructive. Remember the context of this pattern contains the patterns *It's a Relationship, Not a Sale*, *Customer Understanding*, and *Trust Account*.

What you sacrifice in immediate profit will be more than made up in referrals and repeat business.

The customer will learn that you can be relied upon to convey important information, even if it is not good news. The customer will learn to trust your word and will be calmer in the face of announced risks.

When negative impacts surface early, decisions can be made about the best way to address them. In many cases, this can be done with the customer and can lead to an improved relationship and

deposits in your *Trust Account*. In some cases, you may find the customer really doesn't care as much as you thought about the issue and is willing to work with you to resolve the problem satisfactorily.

Once risks have been shared, remember to use *Timely Response*. The customer will expect regular status reports. Don't just leave the customer hanging with a list of showstoppers and no updates.

*When problems come up and we tell Rod Veach, "Don't worry about it!" He believes us. We would never hide anything from Rod. We let him know immediately about any problems.*  
[AGCS]

**Originator:** Linda Leonard

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### ***Customer Relief***

From time to time customers may be disappointed with some aspect of the business relationship. The disappointment may come from unmet expectations, product performance or from simple misunderstandings and is often manifested as anger. More often than not, the anger is directed toward any company representative that is at hand. You understand *It's a Relationship, Not a Sale*. You're trying to develop *Customer Understanding* and build your *Trust Account*.

### **What's the best way to handle customer complaints and protect your own interests?**

No one likes to be yelled at. Our natural response is to be defensive. Being defensive is likely to escalate the customer's anger. Anger can damage the relationship with the customer.

In calm situations, with low emotional stakes, it's easy to deal with people. They will listen to rational explanations, and offer rational responses of their own. But in high-stakes situations, confrontation—overt or subtle—puts everyone on the line. [Senge+99]

As unpleasant as the situation may be, the customer may have good reasons for being dissatisfied. By remaining calm and allowing the customer to vent, the anger will diffuse. Keeping your composure is especially important, since, to the angry customer, you represent the company. Flying off the handle will not increase your *Trust Account*.

No one likes to get customer complaints, but it's worse when they don't complain. When customers walk away unhappy and don't let you know, then you're in trouble. What they don't tell you, they're willing to tell a lot of other people. A satisfied customer will tell four to five people about a good experience, but an unhappy customer will tell seven to nine others. Reports of a negative experience are twice as likely to affect a buying decision as a good report. An unhappy customer spreads a virus of negativity about your business. [Abrams02]

A customer who never tells you about a problem doesn't give you a chance to correct it. If a salesperson is unpleasant to me and I don't let the manager know, the more damage the bad apple can do. If I take the time to complain, the manager can then train, counsel, or if necessary,

fire the salesperson and reduce the damage to company's reputation. [Abrams02]

*Therefore:*

**Listen and don't fake it. Apologize. Respond with helpful phrases such as: "I know these aren't the results you were hoping for," while trying to learn how the customer's business is impacted. Regardless of whether the issue is your fault, don't protect your pride by refusing to accept responsibility for any product or policy. The customer doesn't care whether it's your fault or not. In the customer's eyes, you are the company.**

See a complaint as an opportunity and not a confrontation. Only 20-50% of all customers with problems will tell you about it. They are giving you a chance to improve your company and create a stronger relationship with them. If you handle the complaint well, you can turn a dissatisfied customer into a customer for life. [Abrams02]

Don't argue. Don't blame the customer. Even if the customer has made a mistake, customers always believe they are right, even when they're not. Use *Good Manners*. An irate customer is not a rational customer but, nonetheless, improve your *Customer Understanding*.

Don't be cheap. Correcting mistakes, yours and the customers, is a normal cost of doing business. Trying to save a little money and losing a customer is a poor way of doing business.

Don't try to appease the customer by making promises you cannot keep. Use *Personal Integrity* and stay *Within the Lines*. Ask questions and use *Effective Listening* to find out what the concerns are. Take notes. Assure the customer that the concerns are a priority and follow up on them. When the issue is beyond your capability, escalate the matter to management. Under certain circumstances, a *Beautiful Termination with Satisfaction* may be the best thing.

Trying to solve the problem on the spot has pitfalls. Giving concessions easily may give the customer the impression that angry outbursts are the best way to do business with you. If you promise something you cannot deliver, the customer's expectations will again be unmet and trust will be broken.

The customer will calm down sooner if verbal punches are not returned. When the customer has finished venting, the problem will still be there but the customer will feel better knowing that you understand the issues and will act on them.

You shouldn't take unlimited abuse. Everyone has a different level of tolerance. When someone crosses your personal line, escalate the problem—take it to your manager. [Reingold01]

*I find that showing respect quickly, especially when dealing with an irate customer, helps diffuse the situation.* [Reingold01]

*There's a big difference between apologizing for a mistake and fixing it. Most of us learned at an early age that apologizing is the right thing to do when you're wrong. Saying, "I'm sorry" and "I was wrong" is the mark of a mature person. It takes maturity to open up to someone who's already mad. The act of apologizing buys you goodwill—for a while, but not if you make the same mistake again. If my business depends on your ability to supply me what I need and you*

*don't do that it doesn't matter if you're apologetic. Giving me tickets to the World Series doesn't help either. If I want to stay in business, I have to find someone who can meet my needs because my customers don't care how heartfelt your apologies are. They want results—and so do I. If all you're doing is finding more creative ways to appease customers instead of finding out why mistakes are happening and making sure they don't happen again, you'll find yourself apologizing to a new group of people—your creditors. [Mackay02]*

**Originator:** Michael Duell

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### ***Within the Lines***

You are interacting with a customer and in a position where it's easy to become engrossed in issues and/or problems. You understand *It's a Relationship Not a Sale*. You are trying to develop *Customer Understanding* and working to build your *Trust Account*.

**It's difficult in a problem-solving mode to step back and realize the impact of proposing a solution or giving an answer.**

Many people love to solve problems and answer questions. You want to delight your customers, but customers may have unrealistic expectations and demands. You don't want to make promises you can't keep.

There can be wide impacts from simple discussions that can result in broken promises or incorrect information. Especially during early discussions, your goal is to understand what the customer really wants. It's easy to get carried away in customer interaction especially when trying to build your *Trust Account*.

Everyone represents the company and can potentially impact current, future, and even past customer interaction. Off-hand remarks can have a lasting impact on the customer and current and future negotiations. There may be commercial implications of technical issues, e.g., real-time, memory size and technical impacts of commercial decisions. Don't set the customer up for disappointment. Interactions with the customer can change not only customer perceptions but also dollar amounts in negotiations.

When a tough question comes up, "I don't know but I'll find out!" is a lot safer than bluffing. No one expects you to know everything. This answer shows you're honest, you're not panicking in the face of a challenge, and you're responsive. Be sure to give a *Timely Response*. [Bick97]

Boundaries are good for people. They set limits on actions and make it easier to act. Boundaries are different for different team members. Some can give information and make commitments.

*Therefore:*

**Know your role and don't step outside the boundaries that are appropriate for your position, the setting, the customer, and the point in the project.**

Don't discuss commercial considerations, e.g., price, cost, schedule, and content that aren't part of your responsibilities.

It is not the intent of this pattern to allow a team member to cover up mistakes or avoid talking about risks. Show *Personal Integrity*.

Treat every conversation with the customer as part of a negotiation. Don't give away data or make instant judgments. Don't say, "Oh, that's easy!" or "That's impossible!"

Use *Effective Listening* and take note of any questions outside your area and get back with answers. Own the action items until you find the appropriate person to take responsibility for getting back to the customer.

The customer will feel that concerns are being heard and issues addressed but no commitments are made that might later have to be broken. More than this, the customer's real concerns will be heard but the company's, as well as the customer's interests will be protected.

**Originator:** David Saar

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## **Good Manners**

*I recently placed an order with a company. I asked when the new catalog was coming out. The reply, "Oh, our brilliant marketing department decided not to issue our new catalog until the first of the year," made me feel uneasy. When a customer contact makes sarcastic remarks about the company or someone in it, I feel uncomfortable dealing with them.*

You understand *It's a Relationship, Not a Sale*. You're trying to develop a better *Customer Understanding* and add to your *Trust Account*.

## **When you interact with customers, you don't always think about etiquette, dress, and behavior.**

Common courtesy is so uncommon! Simple, thoughtful acts convey a concern for the other person's welfare that is essential in any business interaction. The workplace environment may be very casual. You may not always be aware of pleasantries when interacting with your team, but these are important in customer interaction. Some people think that considering etiquette, dress, and behavior are a waste of time, but many people can react strongly to behavior they consider inappropriate. They may even take it personally. How we treat each other is an important sign to the customer about how we treat people in general.

Dave Thomas, founder of Wendy's Hamburgers, said, "Be nice to everyone. Be polite."  
[Kohn97]

*Therefore:*

**Use good manners. Be polite. Be aware of body language. Dress appropriately to meet**

## **customer expectations.**

Sometimes "business casual" is acceptable, at other times a suit is required, while on occasion, jeans are the norm. It helps to have a good *Customer Understanding*.

Show respect for everyone, including competitors.

Be especially careful in your interactions with others in front of the customer.

Speak up, speak slowly and clearly. Customers outside North America and the U.K. often do not speak or understand English very well. Use simple language, Avoid slang or jargon. Check frequently that the listener understands your message. Avoid jokes about religion or politics. In general, be careful about humor—it's context sensitive.

Customers will feel that you are concerned about all aspects of your business interaction and are ready to share their concerns and issues with your products.

Don't be so focussed on minding your manners that your behavior is stiff or overly formal.

*NovaCare Inc. once rejected a candidate for the job of top legal officer because he showed up for the interview in a casual outfit with a backpack. Even with better credentials, he wouldn't have passed muster because "he didn't look professional," says Gerry Johnson Geckle, a NovaCare vice president. The job went to a candidate who wore a dark suit and white dress shirt to the interview. It can be just as fatal to flout casual codes. Elementary school teacher Susie Swafford reports she was turned down for several jobs in suburban Colorado schools because she overdressed for interviews. Ms. Swafford says she usually showed up in a linen suit and pumps, her hair and makeup flawless. Big mistake. She met with one principal who wore faded shorts and propped her bare feet on a chair. Another school official interviewed her in jeans. They bluntly told Ms. Swafford that she looked like a "model" or "cheerleader," and that her fancy appearance intimidated other teachers. [Bounds+98]*

**Originator:** David Saar

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## ***Skinny Chicken***

*I went to one of our developers and said, "We have a customer request for a new security cost driver. Can you fit it in?" The developer answered, "I think it's complicated. Looks like six weeks to me. However," he added, "if there's one of the cost drivers they're not using, I can give them a special version of the program with that slot replaced by computer security in a couple of days. Would that be a good interim solution?" This wasn't what I expected but it looked reasonable. The developer delivered the quick fix on schedule and three weeks later I was pleasantly surprised to have a full new version—in half the originally estimated time. Suppose the developer had initially said, "Sure, no problem," and proceeded to deliver the solution in three weeks. I would have been unhappy and the customer would have been unhappy with me. Instead, the developer gave me an acceptable short-term fix and came in ahead of schedule on the longer time request to create a new release of the product. [Boehm00]*

You're showing *Personal Integrity* and informing a customer about an unavoidable slip of an end date. You understand *Within the Lines* and have the power to negotiate with the customer about content and delivery dates. You have enough *Customer Understanding* to identify a subset of the promised product that the customer values. You have a significant *Trust Account*.

**You want the customer to be happy even when a promised delivery will be late.**

Even when you do your best, things out of your control can go wrong, but you shouldn't simply give in to bad luck; you should be proactive in solving problems. Sometimes you can't meet customer expectations but you can work with the customer to find a mutually satisfactory solution.

Sometimes the customer really doesn't need as much as you thought he did and would be satisfied with less if the most important functionality for his business were delivered early.

**Deliver some functionality early. Ideally, this should be the part of the product that has the most value for the customer.**

Use *Personal Integrity*. Negotiate a new end date for the rest of the product. Be sure this date is achievable to avoid disappointing the customer again.

Your customer will be happy for several reasons:

1. The damage of the slipped date is minimized.
2. The most desirable functionality is delivered ahead of schedule.
3. The most solid end date possible is negotiated for delivery of the remaining functionality.

It takes time away from development to negotiate the content of the *Skinny Chicken*, its delivery date and that of the remaining functionality. It also takes time to restructure development to ensure the new dates are met. If the new end date must be moved, you risk serious erosion to your *Trust Account* and perhaps the end of the customer relationship.

*I remember when I first saw this pattern in practice. The development team knew well in advance that the scheduled end date could not be met but they knew the customer so well that they realized which subset of features mattered most for the next release of the customer's product. By drawing a bit out of the Trust Account and making good on their promise to deliver the most needed functionality early, the development team and the customer were both winners.*

**Originator:** Linda Rising

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