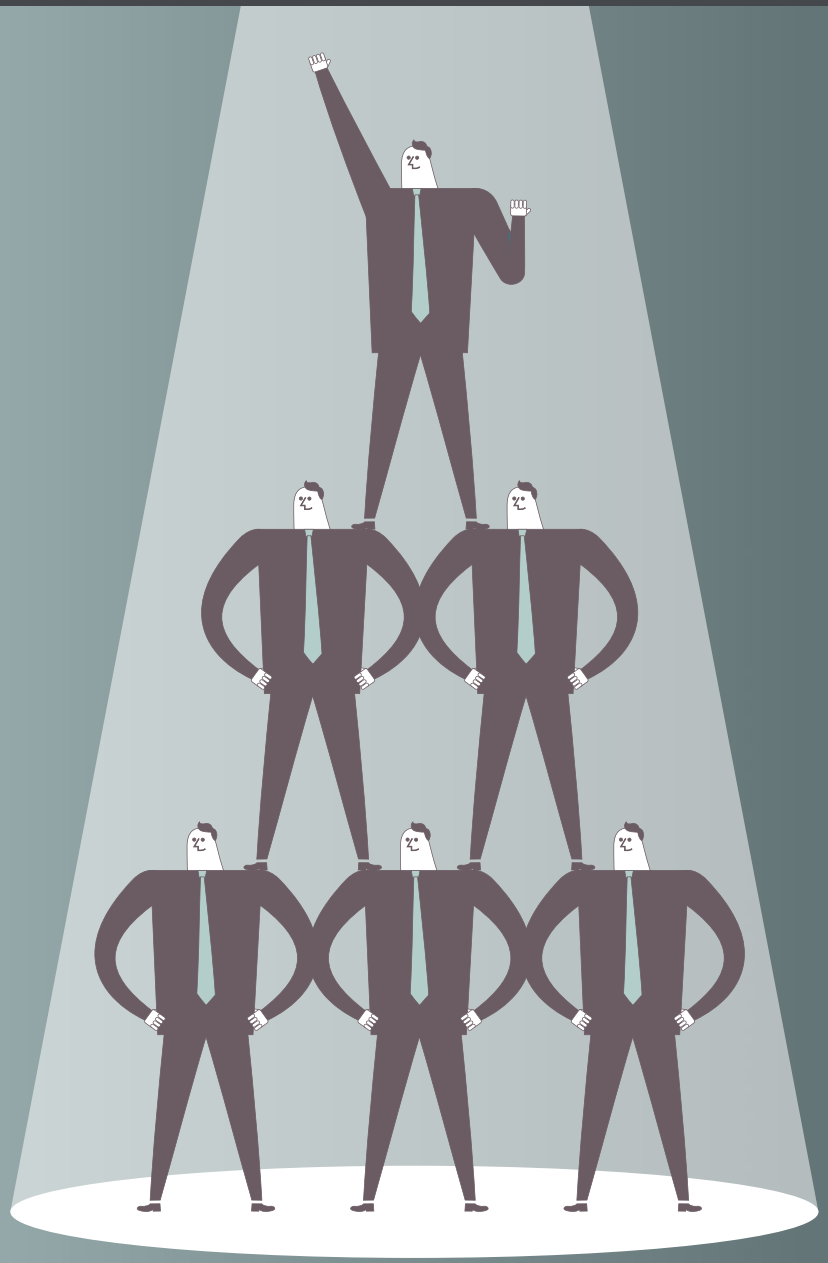
Mighty Guides

MANAGE, MEET & EXCEED CLIENT EXPECTATIONS



22 Solution Implementation Experts Share Their Secrets

Sponsored by: workfront

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FOREWORD

Professional services and implementation teams are under tremendous pressure.

Trends in cloud, mobile, and social technologies have completely changed the way we work, and in turn, the professional services landscape. In the face of tighter margins and expanded roles, many services teams are asked to deliver, collaborate, and drive change faster and in more complex environments than ever before.

Throughout the past decade, Workfront has helped hundreds of services organizations adapt to this changing landscape by implementing a single system of engagement—a solution we call Enterprise Work Management. EWM offers instant, real-time access to project data, social collaboration with internal and external stakeholders, proper resource management, and complete visibility into all work, both planned and ad hoc.

The expert advice captured in this eBook will offer the wisdom and suggestions for best practices you need to be an agent of change in the professional services industry. We hope its insights will help you achieve ever-greater success in the coming year.

Eric Morgan
Workfront CEO

INTRODUCTION

No team enters services implementation expecting to underperform and disappoint the client. Everyone goes with high hopes for beating the timeline, coming in under budget, and leaving the client happy. Unfortunately, problems do happen. The unforeseen is to be expected. How do you manage an implementation so that everyone comes out happy? Is it a question of how you frame success?

With generous support from Workfront, we set out to find an answer to these questions. We gathered 22 seasoned professionals from across the services spectrum and asked:

What advice would you offer to a solution implementation team to help them manage, meet, and exceed their client's expectations throughout the implementation process?

The short essays in this book include expert stories of hands-on implementation experiences and challenges. Reading them, you will find that there is no one answer to that question. There are some common themes—for example, developing strong and lasting relationships is key, as are strong communication skills and well-documented project plans.

I found these stories instructive and fascinating, and I'm sure any services professional would, too. I am confident that you will benefit from the shared wisdom of the experts who so generously gave of their time and energy to bring this eBook to life.

All the best,
David Rogelberg
Publisher

Mighty Guides

Mighty Guides make you stronger.

These authoritative and diverse guides provide a full view of a topic. They help you explore, compare, and contrast a variety of viewpoints so that you can determine what will work best for you. Reading a Mighty Guide is kind of like having your own team of experts. Each heartfelt and sincere piece of advice in this guide sits right next to the contributor's name, biography, and links so that you can learn more about their work. This background information gives you the proper context for each expert's independent perspective.

Credible advice from top experts helps you make strong decisions. Strong decisions make you mighty.

THE POWER OF EMPATHY

SETH A. HOROWITZ

Manager, Professional Services, Navitaire LLC; Accenture, Inc.

Seth A. Horowitz is a hands-on Product Manager and Manager of Business Analysis. He enjoys transforming ideas into great products. Seth has spent the past 15 years involved in the development and implementation of software for the travel industry. He pioneered and led the product management and business analysis component during development of a next-generation Microsoft .Net travel reservation system now used by more than 25 airlines and a rail company. His specialties include product release management, business analysis, and requirements gathering.

Blog

I was in Nova Scotia working with a startup, short-route airline to implement a beta release of our new reservations and passenger service system. As a small company, the airline was short staffed, with everyone doing multiple jobs. In spite of our piling major transformational change on them and diverting key staffers to our project team, they were awesome people who appreciated the opportunity we were offering them.

Looking back, the most important moments in that project did not involve diving into the implementation. Rather, they were our early meetings, when my team traveled to Nova Scotia to sit with the client face to face—once over lunch at a beautiful, rustic forest restaurant—to talk and exchange information about our businesses and, crucially, about each other.

That set a cooperative tone for the entire project so that later, when things got a bit dicey, and we had to ask for compromises to stay on schedule and on budget, I could lean on the good will I had built up getting to know them. I could say, "I get what is important to you and I'll protect that, but we need to stop logging low-priority bugs. We've got to focus on things that have business impact."

> "Until you understand the client's purpose, you cannot really apply priorities."

KEY LESSONS

1. **ENGAGE IN DIALOGUE, AND KEEP AN OPEN MIND. THE GOAL IS MUTUAL UNDERSTANDING.**
2. **FOCUS ON THE NAYSAYERS—THEY MIGHT ONE DAY BE YOUR GREATEST ALLIES.**

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By *relationship building,* I don't mean hanging out at happy hour—although that can help. I mean genuine dialogue that helps you put into context why your clients might not want what you thought they wanted. Until you understand the client's purpose, you cannot really apply your own priorities.

The goal is mutual understanding. Fend off the temptation to work only with your project's converts. Instead, spend quality time with the naysayers.

Why? Advocates are already convinced, but skeptics might best understand the problems your implementation could introduce into their lives. Ignore them, and you might forego your best chance to resolve problems prior to launch.

You can shift the naysayers' point of view if you engage and really listen. You can do more than simply convince a person to raise the white flag. If you're a skilled communicator, you might find that the very person who once most vocally opposed your project is now solidly committed to it.

Note: *This advice reflects my own views and does not necessarily represent the views of my employer, Accenture.*

"By *relationship building*, I don't mean hanging out at happy hour—although that can help."

LISTEN WITHOUT PREJUDICE

VIJAY DESAI
Engagement Manager,
Workday Inc.

Vijay Desai is a senior IT leader who has an extensive track record of success delivering complex IT initiatives. Over his 23-year career, he has held positions ranging from software engineer to chief technology officer for such companies as Electronic Data Systems, Boston Market, Boeing, and McKesson Corp. Vijay is PMP© and ITIL V3 Foundation certified.

Website

Under promise and over deliver is a cliché because it's true—so true that, early in my career, I took the idea to extremes.

Fresh out of college, I joined a small software development company. I thought I was doing well until I got a performance review. It said that anytime someone asked me to do something, my first reaction was always, "No. It can't be done." Then, I would go work on the project and invariably get it done faster than anyone else.

Admittedly, I was following the under promise/over deliver principle, but I was doing so incorrectly. I have learned a lot in 20 years, beginning with that performance review. My two most important lessons learned can be summarized as follows:

- **Listen without prejudice.** I came upon this insight independently, but it dovetails nicely with later training I received from Pat Newmann of Partnerinchange.com, who often says, "Listen as an ally." Same idea. When working with a client on a project's definition, listen carefully. Presume that your client is holding nothing back and knows what his or her company needs, even if he or she is unable to articulate it. Articulation is your job as a project manager. Key tip: repeat—in your own words—what you think the client is asking for. This will help avoid misunderstandings.

KEY LESSONS

1. **LISTEN WITHOUT PREJUDICE TO YOUR CLIENT'S NEEDS.**
2. **COMMIT TO A TIMEFRAME WHEN YOU WILL REPORT BACK WITH IDEAS, READY TO WORK.**

> "Key tip: repeat—in your own words—what you think the client is asking for. This will help avoid misunderstandings."

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- **Commit to a timeframe.** This doesn't mean that you must commit to a timeline for executing a complete solution. You don't need all of the answers up front. The point is to commit to a deadline for reporting back with your best ideas, ready to work. This is a beautiful way to create a collaborative environment with your client.

Remember that in many ways, project management goes hand-in-hand with change management. You'll face resistance. Rather than ignoring the naysayers, figure out who they are. Speak with them, listening carefully to their concerns. Even if you can't fully sell opponents on your solution, at least they are more likely to cooperate. Some may even migrate to your camp, becoming your advocates and selling your solution. What could be a better outcome than that?

These insights spring from my experience in the software development world, but I firmly believe that they can apply in any situation where understanding and exceeding client expectations are the goal.

> "In many ways, project management goes hand-in-hand with change management."

THE ART OF THE SUCCESSFUL SOLUTION

ROY HOH

Director, Customer Care and Customer Experience, IHS

Roy Hoh is a services practitioner dedicated to the advancement of customer experience management practices. In his 20-years career, Roy has held a variety of leadership roles with Fortune 500 technology companies in customer service, service delivery, outsourcing, professional services, strategy and planning, and business operations. Currently at IHS, Roy leads customer care operations and is responsible for the customer experience program, working across the organization to drive initiatives to delight customers through differentiated customer experience.

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Successful solution implementations are as much an art as a science. Senior leadership tends to set expectations without deliberation on the fine details of implementation. The best approach is to set expectations early and often. It's important to make the time and effort to work with senior leadership during the planning process to define the scope and key measureable objectives.

Know Your Fields, and Then Plan, Budget, and Set Expectations Accordingly

An organization that currently has no system, known as a greenfield site, typically has relatively few complications and constraints. Clients' expectations tend to be easier to manage because end users welcome the automation that the new solution provides.

A brownfield implementation, in contrast, is usually more challenging because the organization has an existing system. End users are accustomed to current business practices; the replacement solution requires changes in business workflow, so the project team may face resistance.

> "End users are accustomed to current business practices; the replacement solution requires changes in business workflow, so the project team may face resistance."

KEY LESSONS

1. **SET EXPECTATIONS EARLY AND OFTEN, AND MAKE TIME TO WORK WITH SENIOR LEADERSHIP.**
2. **HAVE A COMPREHENSIVE, LEGALLY ENFORCEABLE CONTRACT IN PLACE.**

ROY HOH

Director, Customer Care and Customer Experience, IHS

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Align to the Objectives and Interests of Client Constituencies

Senior leadership, functional end users, and technical end users are three major constituencies. Unfortunately, these three groups are often not aligned in terms of project scope, objectives, and constraints. Therefore, it's critical that you achieve a common understanding and agreement in advance as to the acceptable trade-offs among the different groups.

Have a Well-Written Contract in Place

A key element in managing expectations is having the right contract in place. A comprehensive, legally enforceable, written contract can mean the difference between a successful project with a client who's likely to work with you again and a project you wish you had never agreed to undertake. Clarity minimizes the risk of miscommunication and helps set the correct expectations.

Your ability to manage client expectations rests on how well you can communicate. Always start with clear expectations, welcome clarifications, stay engaged, and manage the outcome.

"Your ability to manage client expectations rests on how well you can communicate."

UNDERSTANDING EXPECTATIONS FROM PITCH THROUGH EVALUATION

ROLLIN ALLEN

Senior Manager, Project Office, MasterControl, Inc.

Rollin Allen is a quick learner who enjoys challenging situations. He earned an MBA while working full time. His experience lends to the development of improvements in organizational processes or workflows. His experience includes software implementation, manufacturing, and blood and biologic industries. Rollin enjoys spending quality time with his family and friends.

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A vital part of managing, meeting, and exceeding client expectations is to first understand the client's expectations. Understanding and managing client expectations begins in the sales cycle and continues through every phase of the implementation, including evaluation after completion. Implementation teams are the primary people to understand and manage client expectations.

Ideally, the manager of the implementation team will be brought into the sales cycle early, not just after the deal has closed. The implementation team, led by a strong manager, will need to succinctly identify and understand the current state or processes the client uses. When the current state has been defined, the client stakeholders and implementation team will need to develop expectations for the future state (processes), or what client expectations will be when the project has been completed. Initiating a project without a defined future state is a failure to set expectations.

KEY LESSONS

1. **MANAGE CLIENT EXPECTATIONS FROM THE SALES CYCLE THROUGH PROJECT COMPLETION AND EVALUATION.**
2. **EXECUTIVES MAY SEEM LIKE THE MOST IMPORTANT STAKEHOLDERS, BUT THE IMPLEMENTATION TEAM MUST UNDERSTAND ALL STAKEHOLDERS' NEEDS, INCLUDING END USERS'.**

> "Initiating a project without a defined future state is a failure to set expectations."

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The organization may have purchased product to improve itself, but the team that purchased the product may not be the same team that's using or implementing the product. This disconnect can cause conflicting expectations—one from management's perspective and another from the user's perspective. Executives are often seen as the most important stakeholders because they make the final decisions. In managing, meeting, and exceeding expectations for all stakeholders, however, the implementation team will need a firm understanding of not just executives' expectations but end users' perspective, as well.

Managing all stakeholder expectations requires effective communication and a feedback mechanism to all stakeholders to maintain a common vision of the future state of the organization. Executives champion projects and have the ability to clear items that block the success of the project. If expectations are not clearly defined and continually managed, then there's little chance of exceeding expectations.

"Managing all stakeholder expectations requires effective communication and a feedback mechanism to all stakeholders to maintain a common vision of the future state of the organization."

THE MOUNTAIN GUIDE'S JOB

ALEX PENKRAT

Service Practice Leader, Americas Enterprise Services, Microsoft

Alex Penkrat has more than 20 years of experience in the IT industry, primarily in consulting management. A Senior Director in Microsoft's Enterprise Services Division, Alex leads a diverse team of strategy, consulting, and support professionals responsible for the satisfaction and delivery of business value to Microsoft's largest enterprise customers. Alex thrives on challenges, particularly those that make an impact. His successes include cloud, custom application development, infrastructure, strategy, and ERP, leading to numerous awards and recognition within Microsoft.

Website

Imagine that you want to climb a mountain. You would hire an experienced guide to help you accomplish that goal. If the guide is any good, he or she contacts you ahead of time with a detailed list of items to bring. He or she explains what you're going to encounter on the trail, dangers to anticipate, where to step lightly, how long you should expect to climb before taking a break. If you make a mistake, your guide won't hesitate to speak candidly and get you back on track.

When you've reached the summit, your guide slaps you on the back and compliments you on a fantastic job. Back at your car, you think, "That was a great experience!" That guide's job is a lot like a project manager's.

Consider the parallels. Your mountain guide set and managed expectations. You knew exactly what you needed to do to uphold your end of the mission. He or she demonstrated expertise and instilled confidence that you would successfully attain your goal.

At Microsoft, we are measured on customer satisfaction—not successful deployments. If a consultant focuses exclusively on running through his or her project checklist without regard to what the customer has in mind, it's entirely possible to implement a solution successfully and leave the customer totally dissatisfied. That's not being a good guide.

KEY LESSONS

1. **PUT YOURSELF IN THE CUSTOMER'S SHOES. TAKE TIME TO UNDERSTAND WHAT THE CLIENT WANTS, ASK TOUGH QUESTIONS, AND LISTEN CAREFULLY TO THE ANSWERS.**
2. **MANAGE EXPECTATIONS. THIS IS HOW YOU BUILD CONFIDENCE AND TRUST.**
3. **BE CANDID.**

> "It is entirely possible to implement a solution successfully and leave the customer totally dissatisfied."

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How do you avoid that?

- **Put yourself in the customer's shoes.** Understand your client's business objectives and the desired outcome. Be curious, ask thorough questions, and listen carefully. Never ask, "What do you want me to do?" Clients are looking for an advisor, not a laborer.
- **Manage expectations.** Just as the guide makes sure the climber knows what to expect, project management boils down to managing expectations. This is how you build client confidence and trust.
- **Be candid.** Sometimes, you will have to deliver tough messages when your project faces a big challenge, as invariably projects do.

Recently, I had to tell a client that its team was failing to deliver what we had agreed to upfront on an implementation. That, in turn, was threatening our chances for successful delivery. There was no choice: I had to inform the client that its people were putting the project at risk.

It doesn't have to be a difficult conversation, though: you just have to find a way to take the emotion out of it. To do that, you must establish a high level of trust upfront and remain transparent and candid throughout the process.

If you can do that well, everything will work out great. If you can't, you will never make it to the top of the mountain.

> "Establish a high level of trust upfront, and remain transparent and candid throughout the process."

ANN GILDEA

VP of Customer Success, Workfront

Ann Gildea brings more than 30 years of creative, consulting, and management experience to her role as VP of Customer Success at Workfront. She's responsible for the successful onboarding, implementation, and adoption of Workfront for new customers in their first year.

Ann began her career as a graphic designer, earning a BFA from the Rochester Institute of Technology. Prior to starting the GildeaGroup in 1997, Ann spent 12 years at Fitch, Inc. where she focused on international brand and product development consultancy.

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Effective and timely technology can play a pivotal role in helping professional services and implementation teams deliver the right type of service to their clients. The implications of the right technology choice, particularly as it relates to project communications, go even further than that. The right technology can help accelerate your organization's overall maturity while delivering more value faster to clients.

I've been asked for my perspective on managing, meeting, and exceeding client expectations. Here are some thoughts:

- **Choose a single, uniform communications platform.** Keep communications consistent, and stick to a unified platform all the way to the end. That choice should be agreed to, from the sales or finance group's handoff call all the way to the end of the project. If in-person meetings are the preference, that expectation gets set up front. If communications will be conducted through a software tool, then that expectation should be set immediately. Also, identify which types of ongoing reports the client will be receiving on an ongoing basis.
- **Establish a communications loop.** Who will take part in ongoing project communications? Which parties on the client side need to be involved? Is it just one key contact? Is it three? Does each cover different areas of the implementation? Do we need to make sure they are all in the loop every time an implementation update is issued? These questions ought to be resolved during the hand-off call. As a corollary, make sure your work is completely visible. Believe me, this will help you immensely when the client begins to realize that there are lots of features and add-ons they forgot to ask for on the front end. You need complete visibility to manage those ad hoc requests.

KEY LESSONS

1. **AVOID NEEDLESS CHAOS: CHOOSE A SINGLE, DISTINCT, UNIFORM COMMUNICATIONS AND COLLABORATION METHODOLOGY UP FRONT.**
2. **COLLECT AND USE HISTORICAL DATA FROM PREVIOUS IMPLEMENTATIONS. THIS WILL HELP IMMENSELY IN MANAGING CLIENT EXPECTATIONS.**

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- **Leverage your history.** If an implementation team can streamline project planning by taking advantage of historical data from previous implementations, it will be able to spot those persistent roadblocks to efficiency. You might discover that between stages four and five of the implementation process you hit a consistent bottleneck. There are many obvious advantages—not the least of which is that you might eradicate that bottleneck. But even lacking that, you at least will know—and be able to share with the client—that those stops might take, say, two or three weeks. It also puts you in a position to beat expectations—knowing what you know from your historical data, maybe you can streamline and beat the clock.

We are a software provider. It's no secret that we would love for you to consider Workfront software as a unified communications, management, and collaboration platform, but that's not the point I'm making here. We have seen first hand how challenging it is when multiple communication platforms—e mail, phone calls, in-person meetings, Skype, chat, and instant messaging— are all being used. That's a shortcut to chaos.

The real point is that if you can pare that list down to a primary application that all involved parties agree will be the single source of truth for managing the service engagements and communications, things will go more smoothly. That makes for satisfied clients, who then will be on their way to becoming your advocates. As an implementation team, you are in the business of customer service. So, the onus is on you to figure out how to get those things done in ways that satisfy the customer. Unified communication and collaboration is a great place to start.

> "If you can pare that list down to a primary application for managing the service engagements and communications, things will go more smoothly."

COME DRESSED TO PLAY

CRAIG MCQUILKIN
Senior Manager, Americas Professional Services, EMC

Craig McQuilkin is a 30-year high-tech industry services manager who has experience with and knowledge of all aspects of professional services, operations management, and customer support. His competencies include service delivery and management, organizational operations, and service program development. Currently, he supports the Americas Project Management and Delivery Management team in project management methodologies, systems, and operational procedures. The constituency he supports includes more than 600 project managers and 50 managers.

Project management isn't difficult if you come dressed to play. True, complex tasks can be involved, but the basic process of initiate, plan, execute, control, and close is simple. The biggest mistakes a project manager can make involve improper planning and poor communications.

My advice? Come dressed to play and by that I mean - over plan and over communicate everything, and focus on starting your project well.

To be successful, you must engage:

- With the sales team to understand how sales sold your product to the customer.
- Your project team to ensure that the proposed solution will actually work.
- With the customer. Hold a project kick-off meeting to validate and clarify expectations and to reach agreement on what a "successful" completion will mean.
- Always consider your customer's viewpoint. Time to value—or how quickly a client's investment can be put to good use—is always a good place to put your customer focus.

When I moved to Florida, one of the first projects I was ultimately responsible for involved a law enforcement agency that had hired my company to install a system that supported officers needing to retrieve information from licenses plates. The Agency was under tight budget and time constraints— the board had allocated tax dollars to the project and wanted to show time to value quickly.

> "By the time I arrived, the project was underway—and already off the rails."

KEY LESSONS

1. **OVER COMMUNICATE EVERYTHING TO ENSURE THAT THE PROJECT STARTS OFF WELL.**
2. **ENGAGE WITH SALES, THE PROJECT TEAM, AND THE CUSTOMER EARLY TO UNDERSTAND THE PROJECT SCOPE AND EXPECTATIONS.**
3. **TIME TO VALUE IS A GREAT PLACE TO DIRECT YOUR CUSTOMER FOCUS.**

COME DRESSED TO PLAY

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By the time I arrived, the project was underway—and already off the rails. The initial project manager knew things were spiraling out of control and hoped to stumble on a solution as the project progressed. But hope is never a strategy.

I brought in a new project manager, and we sat down together to analyze the situation. It was obvious that things were so badly off track that we needed to halt the entire effort and reset with a new project plan—not what the client wanted.

We were given a week to come back ready to roll. We went back to our sales force to find out what they had originally sold to the client. We met with the solution and engineering teams to find out what our technology could and couldn't do. Then, we created a new project plan, a team of capable people, and returned to the client to start over.

> "Always consider that how a project starts is generally how it will end."

As we progressed, we asked for grades at regular intervals. At first, we received poor grades as you would expect for missing the client's original timeline, but we kept at it. Over time, our grades improved. Ultimately, the Project Manager received an A grade and the project a B+ - not bad, all things considered.

Always consider that how a project starts is generally how it will end. We were fortunate that we were able to salvage that project, but think about how things might have gone had all the elements of over communication, proper planning, and realistic expectations had been established at the beginning.

To be successful in project management, always come dressed to play.

FOCUS ON THE GROUND FLOOR

MITCH MILLER
VP, Professional Services,
Savi Technology

As Vice President, Mitch Miller leads the Savi Professional Services organization, providing technical presales support to the America's Sales organization and the implementation and on-site support of Savi Solutions. Mitch has nearly 20 years of experience in supply chain management and consulting services and manages all aspects of project delivery, from process design to testing to documentation and user training.

Website

In 2002, Cedars-Sinai Medical Center in Los Angeles attempted a now-infamous electronic medical record (EMR) implementation. It was supposed to help clinicians by automating order and lab entries and providing drug interaction alerts. Administrators loved it; doctors hated it. Rather than make them more efficient, the technology slowed clinicians down, and they revolted. Three months and $34 million later, the project was abandoned.

That incident illustrates one of the most important suggestions I can offer any project manager who wants to make customers happy: don't forget the end user. I truly believe that user relationships allow you to be much more successful than administrative relationships alone.

At Savi, we look for an insider project champion to help us sell our project to the client. Where we differ is that when we prepare an implementation, we mandate that the customer help us locate that champion by identifying a super-user with whom we can work directly.
Why? We want to educate and train an actual end user and get him or her comfortable with the platform as quickly as possible. Afterwards, that super-user performs all internal demos, giving us someone whom other users respect to sell our project for us.

My theory is that by recruiting and working with a super-user, the customer's employees can come to believe that we understand their pain and want to make their lives easier. Mentally, that's when the project makes its final and most important sale. Users begin to like and trust us.

> "User relationships allow you to be much more successful than administrative relationships alone."

KEY LESSONS

1. **FOCUS ON THE GROUND FLOOR, NOT THE TOP FLOOR. WORK HARD TO GET USER BUY-IN.**
2. **GET THE CLIENT TO IDENTIFY A SUPER-USER FOR YOU TO WORK WITH. THAT IS A SHORTCUT TO EARNING USER TRUST.**
3. **DON'T LET THE PROJECT PLAN GATHER DUST ON A SHELF. TREAT IT AS THE LIFE FORCE BEHIND YOUR PROJECT.**

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That's no small matter. If users trust the implementation team, it won't be life threatening if a performance problem creeps up. If users don't trust you, however, even the smallest performance glitches will loom large. Users may work against you to make the project fail.

Experience shows that when I have user community buy-in, we win. We might still have work to do selling management on the value proposition, but if users are on board, they will fight to keep your system in place.

Here's a bit of advice to implementation teams hoping to exceed client expectations:

- Focus on the ground floor, not the top floor. Don't disregard executives, but don't forget to include the user base in discussions, demos, and testing. Get buy-in where it matters, and your project will succeed.
- Get organized. Flexibility is important, but I believe that any project should be 100 percent organized and 100 percent structured. Otherwise, there's 100 percent chaos.
- Be process oriented. Adopt standardized methodologies for understanding the project scope, its budgetary and timeline constraints, and to target project sponsors. All that information should be contained in the project plan.

Don't write a project plan just because the boss wants it, the plan should be a living document that tells you where everything and everyone is and what is and is not complete. When problems arise, add them to the plan. A well-documented plan should be the real force behind the management of your project.

> "Any project should be 100 percent organized and 100 percent structured. Otherwise, there is 100 percent chaos."

CULTURAL SENSITIVITY

PHILIP NAGGERT

Senior Project Manager,
Marin Software

Philip Naggert is a Senior Project Manager at Marin Software, a leading cross-channel performance advertising cloud. He lives in London and has worked in the professional services industry for several years, where he still successfully manages and delivers complex implementation projects. Prior to his professional career, Philip studied international business management in Germany and the United Kingdom; he holds degrees in both countries.

Website

It's easy to overlook the importance of cultural differences when it comes to communicating with clients, particularly on global rollouts. You ignore those differences at your own peril.

I grew up in Germany and work in the United Kingdom. I have clients in Spain, Germany, and the United States, among other places. My company is highly globalized. One might assume that I have a keen understanding of various cultures, and largely that's true, but when it comes to operating in unfamiliar locales, it turns out that I have as much to learn as anyone.

I once helped implement a bid-management system for a client in Turkey, a place I had only visited in my childhood. We decided to forego a face-to-face project kick-off meeting and instead set things in motion over a conference call. That simple, innocuous decision almost killed the project.

KEY LESSONS

1. **IGNORE THE CULTURAL SENSITIVITIES OF YOUR GLOBAL CLIENTS AT YOUR OWN PERIL.**
2. **CONSIDER MAINTAINING PROGRESS DOCUMENTS AND PROJECT PLANS IN A CLOUD ENVIRONMENT.**

From our vantage point, there was nothing unusual about the decision. Our Turkish clients, however, preferred Skype videoconferencing when they couldn't meet face-to-face. So, they were displeased when we opted for a blind conference call, although they never expressed that dissatisfaction. We found out indirectly, when they failed to respond to calls and e-mail.

I tried hard to make the necessary connections, but nothing worked. Before long, we were struggling to complete the project. Desperate to make things work, a colleague and I flew to Turkey to meet the clients in person.

That was it—problem solved. The moment we made that simple effort, the client's perceptions changed. They understood we respected and took them seriously. From that point on, they were wonderful to work with, and we were engaged in a great business relationship.

> "We set things in motion with a conference call. That simple, innocuous decision almost killed the project."

PHILIP NAGGERT
Senior Project Manager,
Marin Software

Philip Naggert is a Senior Project Manager at Marin Software, a leading cross-channel performance advertising cloud. He lives in London and has worked in the professional services industry for several years, where he still successfully manages and delivers complex implementation projects. Prior to his professional career, Philip studied international business management in Germany and the United Kingdom; he holds degrees in both countries.

Website

Keep in mind that we were about to lose that client. The simple act of visiting them on their home turf not only resolved our problems but led the client to renew our contract. They even wrote a case study for us after the project ended.

That experience contributed to several lessons I have learned over my career:

- Make every effort to hold a kick-off meeting face to face. This is the point at which roles are defined and your team's client counterparts will be established.
- Establish a central point of contact to make sure that no stray communication is floating around on either end and to keep everything transparent.
- If you are involved in a global rollout, make a special effort to learn the client's culture, both from a business perspective and a social standpoint.

> "Even within the relatively compact European continent, there can be huge cultural differences."

Even within the relatively compact European continent, there can be huge cultural differences. The French and Spanish, for example, like to be almost chummy with vendors. The Germans are all business. I have the advantage of working in a globalized office, so if I don't know enough about a client's culture, I can query people in my company who do. It's always a good idea to do your homework.

There's one final piece of advice that I always give colleagues: create progress documents and project plans in a cloud environment.

Classically, we shared documents created in Microsoft Excel, and sent loads of e-mails around, some of which often got lost. If the client can support it, I strongly recommend accessing a cloud environment so that you can thoroughly document and track your project. You'll be glad you did.

PULLING THE PLUG

HOUMAN ADABI

Director, Global Consulting, Aptify

Houman Adabi has 15 years of experience leading software delivery programs. He is currently accountable for Aptify solutions delivery in the Southern and Eastern United States as well as Global Delivery in Canada and Europe. Previous to joining Aptify, Houman was a Senior Manager at Accenture. Houman earned his Bachelor's Degree from University of Maryland with a dual major in Information Systems and Finance. He also earned his Master's Degree in Business Technologies from George Washington University and is a Certified Project Management Professional (PMP).

Website

This is the story of a project that failed.

I'll foreshadow the ending by giving you the story's moral now: never be afraid to temper a customer's lofty, unrealistic expectations. Be willing to deliver bad news, or you may pay a steep price.

Earlier in my career, a company I was working for was hired for a big, ambitious project. A group of independent companies within the same industry wanted us to develop a common platform that they could use, as a consortium, to consolidate their business processes. This project immediately put us at a disadvantage because we were dealing with a consortium—we had no clearly appointed champion that would make final decisions for our client(s).

That, however, was not nearly as big a problem as what proved to be the customers' misguided and sometimes-competing expectations. Their goal was to deploy a common, standardized system that they all could adopt without any growing pains. The problem was that they were not ready to change their business processes to a common set.

Where we as a team, and I as a team leader erred was in failing to tamp down those false expectations immediately. We accepted the project, believing that we could deliver, an assumption based on our belief that the consortium members would play ball together and agree to set up common requirements.

KEY LESSONS

1. **TO MEET OR EXCEED A CLIENT'S EXPECTATIONS, YOU FIRST MUST TRULY UNDERSTAND WHAT THEY ARE.**
2. **DON'T BE AFRAID TO TAMP DOWN A CUSTOMER'S LOFTY AND UNREALISTIC EXPECTATIONS. OTHERWISE, YOU MAY BE ON A PATH TO FAILURE.**

> "Be willing to deliver bad news, or you may pay a steep price."

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But there was no consensus. We could not establish a single set of written requirements and designs that met everyone's needs.

Eventually, we were forced to step back and reevaluate. We concluded that if even half of the consortium's plans materialized, a much longer timeline and a bigger budget would be needed. As originally devised, the plan was never going to work.

So, we made a tough decision. We pulled the plug. We recommended the players implement the technologies individually rather than as a collective. That's what happened, and the consortium disbanded.

It would be easy to view that as a negative outcome because ultimately we didn't deliver an intended deployment, but we made the right decision. We got out before the build phase got rolling. Had we tried to hang on and row against the prevailing current, we might well have gotten stuck in an impossible situation.

> "The plan was never going to work. So we made a tough decision. We pulled the plug."

The key lesson I took away is this: to meet or exceed a client's expectations, you have to understand exactly what they are. So now, whenever I'm about to dive into a project, I ask four questions:

- What is the list of requirements for this project?
- What is the business problem or need that we can help you address?
- What outcome do you want?
- Who is the decision maker and does he/she have the support of the entire organization

The answers form the basis of a well-documented list of requirements that we can feed into our analysis processes to define exactly what we need to do. It then becomes much easier to know if you will meet or exceed your customer's expectations.

A POSITIVE ATTITUDE (WITH A TOUCH OF REALISM)

ROBERT PRAGAI
PMO Manager,
Datavalet Technologies

Robert Pragai's sports background laid the foundation for his desire to work in and lead a team. Project management was a natural fit for life after sports. Surrounded by great people and a drive to continuously improve, he has successfully led a diverse portfolio of projects within the managed services and IT industry for more than seven years. PMP and ITIL certified, Robert is a PMO Manager at Datavalet Technologies, his primary goal being to develop, manage, and improve the PMO.

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Following processes, setting expectations, sound communication, and establishing a plan to achieve the agreed-upon deliverables are crucial elements in managing clients expectation. With those in place, why are customers' expectations not being meet on a continuous basis?

If we remove the customer as a factor, it comes down to the intangibles that a project leader and the team consistently bring to the table that allow us to excel and exceed customers' expectations. These soft skills must emanate from the project leader and are in turn reflected in the implementation team:

- **Positive attitude (with a touch of realism).** Project leaders must embody and demonstrate the attitude they want their team to have; then, the team will look to them for guidance and feed off their actions. A team is a reflection of its leader. A positive attitude is contagious and lays a foundation for a successful implementation.
- **Team mentality ("we" not "I").** Each member of the team has a role, and if the project fails or succeeds, it's done as a team. Share the praise with the team, and ensure that each member understands how he or she influences the success of the implementation. In front of the customer, it's a unified front, not an internal blame game.

KEY LESSONS

1. **MAINTAIN A TEAM MENTALITY, AND TAKE OWNERSHIP.**
2. **REMAIN SOLUTION ORIENTED.**

> "Project leaders must embody and demonstrate the attitude they want their team to have."

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- **Don't disappear, take ownership.** Project leaders can influence the outcome of a major issue by the way they respond to the disaster. If the leader disappears and doesn't face the issue, it could lead to disaster and perhaps the demise of the project. This also applies to team members.
- **Solution oriented.** Problems will occur, and it's key that all avenues are explored prior to involving the customer. The team and project leader must constantly look for solutions within a framework of the deliverables agreed upon and should not be satisfied without performing this act.
- **Sociable.** The degree varies according the team and project, but establishing a rapport with the customer and not being afraid to meet face-to-face with the customer, are key skills that allow you to develop and cultivate a bond within your team and with the customer.

The customer's perception and reality are not always the same, and to successfully manage expectations, you must consistently remain aligned to the customer's perception and the reality as closely as possible. If your team can employ the skills outlined, it will lay a good foundation and increase your chance of exceeding customers' expectations and create positive, repeatable experiences.

> "Problems will occur, and it's key that all avenues are explored prior to involving the customer."

PASSION: THE KEY TO EXCELLENCE

LARRY HERRING

Professional Services Manager
Advanced Technology, CDW

Larry Herring has 34 years of global multifunction experience within IT. An SME in customer service, support, professional services, and delivery, he has worked with leading professional services and program management teams worldwide. Larry specializes in bringing best-of-breed technologies and solutions to his company's clients, ensuring 100 percent customer satisfaction at all levels on a worldwide basis.

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When I think of everything that's involved in working through a complex project, the single most important requirement for exceeding a client's expectations is being passionate about client service. It cannot be artificial passion, it has to be part of your culture, to the point where you live and breathe a desire to go above and beyond your client's needs. Only in this way can you meet and exceed expectations.

Clients know when you're passionate about their project. We have a British client—a global, Fortune 500 company that has more than 10,000 employees—that's putting in a new data center in Atlanta, Georgia. The project lead told us that he has a great technical team and complete confidence in the plan. So, why are we here? He said, "You totally get what we are trying to do. That's why you are here."

Our clients pay good money for us to understand the business problems they're trying to resolve and provide a service that will make them successful. How do we do that? The strategies for success in complex projects aren't a mystery:

- Listen to the client and understand the client's pain.
- Understand and manage the client's expectations.

KEY LESSONS

1. **TO EXCEED EXPECTATIONS, YOU MUST BE PASSIONATE ABOUT OWNING THE CLIENT'S PROBLEM.**
2. **IF SOMETHING DOESN'T MAKE SENSE, ASK A LOT OF QUESTIONS UNTIL THOSE QUESTIONS ARE ANSWERED.**

> "The single most important requirement for exceeding a client's expectations is being passionate about client service."

PASSION: THE KEY TO EXCELLENCE

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- Do what's best for the client. If it makes sense, go with it. If it doesn't make sense, ask a lot of questions until those questions are answered.
- As a service provider, you know best practices that come from your organization's methods and experiences. Follow your own best practices and adhere to the best practices of technologies you're implementing.

These points are fundamental to meeting your client's expectations. To exceed those expectations, you must have a passion about owning the client's problem and taking responsibility for the outcome of your work.

Despite a rough childhood, I thrived by learning that owning problems and taking responsibility enabled me to accomplish more than I ever thought possible. I carry that same passion for excellence to the client, and that is the real secret to exceeding expectations.

> "Clients know when you're passionate about their problem."

UDAI TENNATI

Senior Director, Professional Services Americas, Manhattan Associates

Udai Tennati is a veteran in the supply chain software space. With more than 15 years of professional services experience, he has been instrumental in driving significant business benefits for many Fortune 500 companies by optimizing their supply chain functions. Udai also leads a professional services division with a significant offshore presence. A resident of Atlanta, Udai is an avid golfer and hopes to play the top 100 public courses before he retires.

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Software isn't really a tangible asset when the purchase or deployment decision is made by a company. When my company sells and deploys a supply chain management software system, we know that until the software is 'in action' we're really delivering only one tangible asset: a relationship and commitment to the client.

Usually, we think of meeting and exceeding client demands in terms of coming in ahead of schedule and under budget—a transactional attitude. In my opinion, it's developing trust, fostering human connections and long-term relationships that create the real value for us as vendors and for our customers.

There are practical implications to figuring out what makes a customer tick. Say you show up on the client site and the client's project lead immediately berates you over some small problem. Maybe you have actually done something wrong—if so, you find it and fix it. After all, trust matters to you, right?

But maybe you did nothing wrong. Maybe that guy spilled coffee on his keyboard that morning and feels like taking it out on you. Understanding what's really going on might save the project. If you take the time to understand what drives that person, you will know that he or she is generally rational and that such incidents are outliers. You can thus react calmly and work through the anomaly.

I can think of many instances where, having developed a long-term relationship with a client, I was able to help steer a project back on course after things had gone badly astray. One specific instance stands out.

> "There are practical implications to figuring out what makes a customer tick."

KEY LESSONS

1. **TRY TO AVOID BEING A PURELY TRANSACTIONAL VENDOR. BRING A HUMAN TOUCH TO YOUR PROJECTS.**
2. **DEVELOPING A SOLID CUSTOMER RELATIONSHIP CAN BE A PROJECT-SAVER WHEN A CRISIS STRIKES.**

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After an eight-month search, a large company in the specialty retail space decided to hire my firm to implement our supply chain technology. The project did not go according to plan and I was introduced into the account to help salvage the situation. At this point, I was a known commodity in the company because its chief information officer (CIO) was on the board of another of my corporate clients. He trusted me, told me the door to his office was open if I needed to discuss any problems. I reciprocated from the start, encouraging the manager who was overseeing the project to call me at any time—which he did many times, including all odd hours at night.

As it turned out, that project's delivery was not smooth. The client had to go through a corporate restructuring, and so did my company. Timelines were not met. The implementation ultimately went south, and we had to perform a complete redo to an upgraded solution.

> "Five years after that project was finally complete, the customer put in a large order for new software with us."

The process took several frustrating years, but the human relationships that were consciously nurtured on both sides saved us. Five years after that project was finally complete, the customer put in a large order for new software with us.

I make a distinction between transaction-minded vendors—those focused exclusively on meeting schedules and keeping on budget—and those like us, who are much more relationship driven. The payoff to the latter approach may be slower and longer term but potentially quite big. You could end up working with the client for many years. The CIO you're working with at one company could end up working at another company and hand you a brand new customer. The human factor matters.

DO SOMETHING EXTRA THE CUSTOMER ALWAYS REMEMBERS

JOHN O'MELIA

SVP & GM, Documentum Business Unit, EMC

John O'Melia leads the Documentum Business Unit within EMC's Enterprise Content Division, based in Pleasanton, California. In this role, he is responsible for leading the products organization and the services organization, which encompasses consulting, education, cloud services, and customer support. John joined EMC in 2004 from IBM, where he was a partner in the firm's business consulting services group. Prior to IBM, John spent seven years working as a management consultant with PricewaterhouseCoopers LLP.

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In my experience, the most important way to meet customer expectations is to understand what success means to the customer. Every customer has a dream. The better we understand that dream, the better we are at reaching a shared vision with our customer about what success looks like and the more likely we are to delight that customer.

Knowing what's in the statement of work (SOW) is not enough. There's often a degree of separation between the team that sells a project and the team that implements it. You have to sit down with the customer at the beginning, understand the customer's vision, go through the SOW with the client's team, and reach a common understanding. Sometimes, projects get into trouble or requirements change. When that happens, you can always go back to the original understanding and work it out.

Having that understanding with the customer is the key to meeting expectations. Exceeding expectations is the "wow" factor, and sometimes, it's a small thing. Here's an example.

KEY LESSONS

1. **WORK THROUGH THE STATEMENT OF WORK, COMMUNICATE, AND REACH A COMMON UNDERSTANDING.**
2. **WHEN A PROJECT GOES ASTRAY, YOU CAN ALWAYS GO BACK TO THE ORIGINAL UNDERSTANDING AND WORK IT OUT.**

> "Every customer has a dream. The better we understand that dream, the better we are at reaching a shared vision."

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Our client was looking for a prerelease build for a complex project that we were working on. The request put stress on the development team, who were in the middle of development and testing, and the schedule was tight. This team really wanted to focus 100 percent on getting the finished product out, but our team at the customer site insisted that they needed a prerelease build to test in their environment and show their internal customers. The development team was frustrated at having to do it, but they created the build and packaged it for the customer. The person who owned the task of shipping it to the customer looked at the installer and looked at what we were shipping to them, and he said, "You know what? This is a little complicated. I can write an e-mail with the instructions, but I think they're going to struggle." On his own, he quickly made a YouTube deployment video that provided step-by-step walkthroughs for the on-site implementation team.

Sometime later, I went to visit the customer. The project was complex, but the only thing the customer wanted to talk about was that video and how appreciative they were that we had made it for them.

> "Exceeding expectations is the "wow" factor, and sometimes, it's a small thing."

FOUR WAYS TO EXCEED EXPECTATIONS

JERRY O'CONNOR

VP, Advanced Solutions,
Trading Technologies

Jerry O'Connor is a dynamic and innovative solution provider who forges strong teams to deliver applications that exceed clients' expectations. Jerry has been consulting for clients for 20 years, with a focus on the futures financial industry for the past 16 years. His unique ability to consistently deliver what the clients want has resulted in thousands of his patented applications in use.

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Getting an implementation right involves the whole software development life cycle. There are four key elements to meeting and exceeding client expectations.

First, building the right team is paramount. When I put together an implementation team, I look for people who are "100-percenters." These are people who know how to do what needs to be done without doing too much, which can complicate the process, and without doing too little, which would cause you to fall short of the requirement. It is also important to select team members who will have a great rapport with the client.

The second point—and this is the most important of all—involves setting expectations for the whole work group. I believe that the most effective way to exceed client expectations is to develop a no-bugs ethic within the team. This can be a challenge because it has been ingrained into the psyche of developers that software will always require patching; if something doesn't work perfectly now, it can always be fixed later. But an implementation team will have far more success if they make sure there are no bugs when implementing a solution. Obviously, there will be bugs—your team will find them, and your client will find them—but if you establish a standard that the most horrific thing is for the client to discover a bug, then you can set yourself up for greater success.

KEY LESSONS

1. **WHEN SCOPING A PROJECT, BE CLEAR AND UP FRONT ABOUT UNKNOWNS.**
2. **TAKING SHORTCUTS OFTEN COSTS MORE TIME IN THE LONG RUN.**

> "At the end of the day, the client comes to think of it as their product, tailored to their needs."

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A third important success strategy is managing the client and their expectations. This management starts at the very beginning, in the way you scope a project, including being clear and up front about unknowns. Communications are extremely important, not just for updating the client on progress but for keeping the client involved and answering overlooked, mundane design questions during development. This is an excellent way to engage with the client so that they own the solution. At the end of the day, the client comes to think of it as their product, tailored to their needs.

Finally, something must be said about project milestones and schedules. These are important to moving a project forward and measuring progress through an implementation. Meeting schedules is important, but not if it means taking shortcuts. If you're taking shortcuts and using workarounds to meet milestones, you're not reducing the amount of work you ultimately have to do—because those shortcuts aren't 100% of the client's needs. At the end of the day, the client wants a complete solution. That's not ultimately measured from when the client first receives the software, either: it's when they are happy using it. That's the true benchmark.

> "I believe that the most effective way to exceed client expectations is to develop a no-bugs ethic within the team."

MAKE YOURSELF A TRUSTED MEMBER OF THE CLIENT'S TEAM

AARON NELSON

Technical Support Manager,
ProModel Corporation

Aaron Nelson has worked for ProModel since 2007, managing the technical support team for the United States and Canada. Aaron is based out of ProModel's Orem, Utah, location. He and his wife, Angie, are expecting their first child this year. Reliability and dependability are key qualities that Aaron focuses on personally and as a goal for the team as they provide solutions to their customers.

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I manage a support team that helps companies use our products to model business scenarios as they design their own business systems. The support my team provides goes beyond traditional technical support because it requires an intimate knowledge of the customer's business practices and goals.

The most valuable strategy for exceeding customer expectations is making customers feel like they have a friend and partner when they reach out to you. In this way, their success becomes your success. Here's an example.

I've been working with a particular customer for more than five years. The company started with one license of our software, and its project manager turned out to be a demanding individual—detail oriented and meticulous about documenting everything. He has always required a lot of support, and we never let him down. Our goal has always been to respond to customer questions and e-mail queries quickly, usually within minutes, and that's exactly what we did with this customer, even though his support requirements were higher than usual. It made a big difference to him.

After two years, his company bought a couple more licenses. After five years, they bought 20 more licenses in addition to what they had already purchased. Our software has now become a flagship tool for their company, largely because of the unwavering support that we provide this project manager.

KEY LESSONS

1. **MAKE YOUR CUSTOMER'S SUCCESS YOUR SUCCESS.**
2. **YOU MUST UNDERSTAND WHAT CUSTOMERS ARE LOOKING FOR, AND CUSTOMERS MUST KNOW THAT YOU UNDERSTAND THEIR NEEDS AND OBJECTIVES.**

> "The most valuable strategy for exceeding customer expectations is making customers feel like they have a friend and partner when they reach out to you."

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What's interesting about this story is that through our support system, this project manager was able to dependably deliver results with such success that he grew his own team within his company. When he started, it was just him. Now, he manages a whole team of business modeling experts. His success became our success.
The challenge, of course, is building that level of trust with a customer. To earn that level of trust:

- Understand what the customer is looking for. Just as importantly, make sure the customer knows that you understand their needs and objectives.
- Communicate with your customers so they know you understand their issues and they know you're resolving it. If they bring something to you that is a mystery, tell them that you don't know the answer but you'll research it and find the answer. Always come full circle and bring closure to issues.
- Be prompt. We have a policy of responding within six business hours, but it rarely goes that far. Our customers know we have this policy. In most cases, we respond within minutes.
- Be kind to your customers. You may be having a bad day, they may be having a bad day, but that's no excuse for you to make their day worse. Customers expect quality and professionalism when they reach out to you. They want to know that you care about what they're trying to do.

You want your customers see you as a reliable friend, someone they look forward to reaching out to for help.

> "Customers expect quality and professionalism when they reach out to you. They want to know that you care about what they're trying to do."

READING YOU LOUD AND CLEAR

CINDY TREPTOW

Senior Business Consultant, inContact

Cindy Treptow has more than 20 years of contact center experience, where she primarily focused on quality management, project management, training, and coaching, with a passion for both employee and customer satisfaction. She is a proven leader who has expertise leading complex projects, building teams, and process improvement. She attended the University of Wisconsin Lacrosse and is currently a Senior Business Consultant with inContact.

My company implements contact center software for large, complex companies that require well-organized, automated processes to deal with customer service requests through many channels. When I was a hands-on project manager, l learned two valuable lessons: (1) agree on deliverables and how success will be defined immediately, and (2) establish effective communications so that if something goes wrong, you can react effectively.

Here's one instance where effective and controlled communications saved my hide on a project.

I was implementation lead on a survey project my company was performing for an insurance client with many locations and 24 x 7 hours of operation. Going in, we did a great job of setting expectations and defining deliverables—or so I thought. Everything went perfectly until the testing phase just before launch. That's when it became evident that we had a different understanding about one tiny item on the expectations list.

I knew that this company had international locations and took calls 24 hours a day, seven days per week. What I did not realize is that the client had established me as the sole point of contact for 100 end users for testing that reached across all time zones and was therefore on a continuous, 24-hour work cycle.

KEY LESSONS

1. **AGREE ON DELIVERABLES AND HOW SUCCESS WILL BE DEFINED IMMEDIATELY.**
2. **ESTABLISH EFFECTIVE COMMUNICATIONS SO THAT YOU CAN REACT EFFECTIVELY WHEN HINGS GO WRONG.**

> "That's when it became evident that we had a different understanding about one tiny item on the expectations list."

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I had assumed that the client had designated one of its own people to coordinate things on their end and that person would communicate with me. Instead, when testing began, I received thousands of test responses and bug alerts. My phone number and e-mail address had been given out and testers were instructed to contact me directly if they discovered problems or had questions with the interface.

Initially, it was overwhelming. But, in the end, the solution was relatively simple. I went through the e-mails and created a list of the most common problems people were identifying. Then I sent an e-mail to all testers, informing them that we knew about the most common problems they were encountering and were fixing them. The tidal wave began to subside.

Note that the client never knew that the project didn't go exactly as planned. The communications remained controlled and restrained, and in the end, it was a successful implementation.

> "Note that the client never knew that the project didn't go exactly as planned."

Establish deliverables and communications: I realize that these are basic lessons, but they are important. Whenever I'm embarking on a project and think that I'm forgetting something, I think back on experiences like this one. Then, I make sure that I know all the parties involved, who my contact will be for every little thing, and who will be contacting me.

Job one is setting deliverables and expectations—that never changes—but sometimes, you need more than that. You need a clear picture of who owns each step of the process. A good back up plan never hurts, either.

FAIL FAST, RECOVER FASTER

RICHARD REID

Vice President,
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Richard Reid is the Vice President of Digital Services in The Freeman Company's Audio Visual division. He serves as a key technical sales liaison, leading company efforts to secure new and renewal business across the enterprise. Richard has more than 25 years of IT experience and a diverse and accomplished background in technical sales consultation, software development, and infrastructure management while focusing on providing exemplary customer service.

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"Le mieux est l'ennemi du bien." Google's translation of this intriguing Voltaire quote is "The BEST is the enemy of GOOD."

One might challenge these notions as being the polar opposite of exceeding client expectations, but I disagree. At the companies I've worked for over the years, I've always challenged my team to "fail fast" en route to improving our services and delivering reliable and scalable solutions. Why? Because the sooner you hit a wall when trying to improve something, the sooner you change course and (hopefully) begin moving in the right direction towards attaining your goal.

This way of executing often requires taking risks, thinking outside the box, and trying things that have never been tried before; especially in an environment where processes have already been refined as fortified benchmark standards over many, many years.

When I first joined Freeman, many of our department's processes were reactive and unpredictable. While our employees did a great job of responding to the needs of our internal business partners and customers, we didn't do a very good job of anticipating those needs in advance and putting together a consistent and proactive course of action.

An example that comes to mind was a digital signage implementation we did for a large industry meeting a few years ago. Convention organizers directed us to design digital signage with arrows directing attendees to their meeting rooms. They were to be placed in strategic locations throughout the venue. The problem? The locations hadn't been mapped out according to where power outlets were for running the signs!

KEY LESSONS

1. **FAIL FAST EN ROUTE TO IMPROVE SERVICES.**
2. **ENCOURAGE CONTINUOUS IMPROVEMENT BY PUTTING PROACTIVE OPERATIONAL PLANS IN PLACE.**

> "Don't hesitate to retire obsolete technologies and put new systems in place."

FAIL FAST, RECOVER FASTER

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We had to scramble to move the displays to locations that had access to the outlets, often on a wall facing the opposite direction. Once they were moved, our developers had to re-do the arrows to make sure the hundreds of sessions were mapped out properly. That may not sound like a big deal, but had we not reacted quickly and effectively, it would have been very embarrassing for our customer when their event opened.

> "There are no traffic jams along the extra mile."

As a result of the digital signage challenge, we now have a more comprehensive requirements gathering process for designing our solutions and anticipating the needs of our customers. In order to deliver "world-class" products and services as our business was growing, we encouraged continuous improvement by putting proactive operational plans in place and breaking them into well defined, short term, measurable steps.

So, how do you commit to creating interdependent relationships with clients while managing, meeting and exceeding their expectations?

- Make sure you have sufficient people, processes, and equipment in place to deliver services when they are needed.
- Quickly address what goes wrong, and create a plan to prevent issues in the future.
- Don't hesitate to retire obsolete technologies and put new systems in place.
- Conduct frequent collaborative meetings, and hold each other accountable.
- Measure progress.

By fostering an environment in which it is okay to take risks, learn from mistakes, quickly remedy, and provide a solution, we're able to meaningfully drive the core value of continuous improvement in the organization. Prior to joining Freeman, I was the VP of IT for former Dallas Cowboys quarterback Roger Staubach's commercial real estate company. Establishing and maintaining trust and credibility with our clients was a guiding principle for our organization and a quote from him that I took to heart and applied during my tenure there was "*There are no traffic jams along the extra mile.*"

THE KEY: UNDERSTANDING YOUR CLIENT'S EXPECTATIONS

EARL GREER

Vice President, Solution Sales, MoreDirect

Earl Greer is the Vice President of Solution Sales and Enterprise Industry Vertical Markets for MoreDirect, a PC Connection Corporation subsidiary focusing on enterprise customers. Having previously worked for SARCOM and EnPointe Technologies, Earl began his IT career with IBM, supporting Fortune 100 clients in various services and sales capacities. Earl has more than 30 years of experience in the IT industry, providing a wealth of experience and a service-oriented foundation that supports his leadership style and vision.

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Having been involved in complex technical projects my entire career, I have come to realize that there are really just two rules for meeting and exceeding customer expectations. One is to understand the customer's perspective; the second is to maintain an understanding of that perspective throughout the project. If you don't understand the total customer perspective, you will never meet the customer's expectations. But how do you gain and maintain total insight into the customer's perspective?

First, you capture the customer perspective through a series of structured questions and interviews, with regular checkpoints along the way. A successful implementation to a chief financial officer could be a failed implementation to a chief information officer, and the vice president of IT might not know anything about the initiative at all. I stress to my team the importance of understanding the complete perspective, including the perspective of all stakeholders, and they must do this before they make assumptions about the customer's desired outcome.

It is just as important to *maintain* your understanding of the client's perspective. Things change in the course of a project, but if you know the customer's perspective and stay close to the customer, you can make adjustments more smoothly. Embrace change, because change is an opportunity to better understand the customer's perspective. Maintaining that understanding means continually staying in close communication and receiving buy-in at every step along the way. Again, understanding their perspective drives how you approach your contacts on the customer team. You can't always follow a standard operational template, you have to adjust so that you do your regular true-ups and base touching on their terms.

> "Embrace change, because change is an opportunity to better understand the customer's perspective."

KEY LESSONS

1. **IF YOU DON'T UNDERSTAND THE TOTAL CUSTOMER PERSPECTIVE, YOU WILL NEVER MEET THE CUSTOMER'S EXPECTATIONS.**
2. **MAKE THE CUSTOMER'S EXPECTATIONS YOUR REALITY.**

THE KEY: UNDERSTANDING YOUR CLIENT'S EXPECTATIONS

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Two stories illustrate the importance of gaining and maintaining customer perspective. The first was a difficult learning experience that shows the importance of having multiple touch points with a client. We were working on a big project in a large organization, and in the middle of that project, the organization became busy and requested that we cut back on meetings and use e-mail updates. Unfortunately, our primary contact left the organization. We had no indication that that person had gone until three months down the road, when the customer stopped paying our invoices. We were sending our reports, but nobody was receiving them. We ended up having to rebate the customer a six-figure sum, which was the salary of one engineer for a year. That hurt the team.

> "If you are seen as one of theirs and they're seen as one of yours, that's magic."

More recently, I worked on a data center relocation involving a divestiture, where we were interfacing with two separate client teams. By having a more complete perspective—and multiple points of contact—we have been more agile in responding quickly to all of the various stakeholders' needs.

Our most successful organizational engagements happen when the line between us as service providers, and them as clients, begins to blur. If you are seen as one of theirs, and they're seen as one of yours, that's magic.

SHAWN REESE
Vice President of Professional Services, eLynx

Shawn Reese has more than 21 years of software development, project management, and customer service experience. He currently oversees the customer implementation and support teams at eLynx, providing exceptional customer service from design and deployment through postproduction of eLynx solutions. Shawn earned a bachelor's of business administration degree in management information systems from the University of Dayton and has earned his Project Management Professional certification.

Website

Nothing helps you focus better than a client yelling at you.

I once conducted a Software as a Service (SaaS) deployment for a state health and human services department meant to track home health care service staff whose work fell under Medicaid rules and reimbursements. The technology was complex and the end users not technically savvy. We kept running into issues around how data were entered and pooled as well as how the customer received it. The state needed to issue checks based on the data and couldn't do so correctly. It was causing big problems.

Complicating matters, the state had been one of our earliest customers and was still operating on our legacy software. In this instance, we were trying to implement new services underneath the older system, and it just wasn't working.

Finally, the client had had enough and yelled at me.

Several key members of my team and I sat down with the agency's key IT staff. We locked ourselves in a room and dug deep into the data, scanning code to figure out where the problems were. Eventually, we identified and resolved them.

KEY LESSONS

1. **BECOME WELL ROUNDED TO UNDERSTAND BOTH THE IT SIDE AND BUSINESS SIDE OF THE COIN.**
2. **BE A "DOER," AND DIVE DEEP INTO THE PROJECT.**

> "Being well rounded, in my mind, is key."

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These days, my work is in document management, delivery, and signature services, but I started in the development world. That breadth of experience has been a real advantage to me. Being well rounded, in my mind, is key. It has allowed me to understand both sides of the implementation coin. It means that I can talk the customer through certain barriers and constraints. If, for instance, a client is leaning toward functionality that promises a better user experience but is wrong for them technically, we can discuss it and they will take me seriously.

Approaching project management as a "doer" allows me to continue developing as a well-rounded professional. I always want to understand what the rest of the team is doing. I check in with each team member daily and involve myself in everything—even seemingly trivial issues like why a button should be red instead of blue.

> "I involve myself in everything—even seemingly trivial issues like why a button should be red instead of blue."

Making a habit of diving into the project details allows me to better understand our internal processes. It also gives me the ability to explain why something works the way it does or, when things get hot, why something doesn't do what a customer expects.

I firmly believe that having made myself a well rounded project manager is a big reason we got that health and human services project back on track.

The way I see it, there are two kinds of project managers: those who strictly manage the project, its schedule, and its tasks and those who dive into the project details to understand everything that's happening and why. The latter is the kind of manager I strive to be.

MEETING AND EXCEEDING EXPECTATIONS IS ALL ABOUT COMMUNICATION

JOSEPH BULSAK

Technology Consultant

Joseph Bulsak has served several companies as a professional services leader, with such roles as business development executive, services brand executive, delivery manager, and a consultant for IBM Global Services, where he started a specialty services group focused on application software migrations for IBM Lotus. Most recently, he has served as Vice President of Professional Services for Binary Tree. His global experience implementing and delivering services-based solutions and leading services team prepares him for his contributions. Today, he is an independent consultant.

In my years of overseeing technical implementations, I've followed many best practices, but at the heart of all of them is good communications. In the following list of practices I follow to ensure project success, you will see that communication is the essential ingredient:

- From the very beginning, talk to the client often, and make sure the client understands what you're saying.
- It's essential that you set expectations up front. Doing so involves walking through the statement of work (SOW) to make sure that what's documented is exactly what the client expects. What determines success depends on what the client thinks you're going to do.
- Be sure that you and the client agree on the success criteria. This goes beyond fulfilling the terms of the SOW: it involves agreeing on basic assumptions and dependencies, such as the availability of client resources. Lack of clear understanding on these points is a common source of problems.
- When you agree on a communications strategy, it is essential that you establish a line of communication with the executive sponsor, even if only for brief updates or issue notifications.
- Establish a plan that clearly states what is going to happen and every participant's commitments. Be sure that everyone fully understands and agrees with the plan.

KEY LESSONS

1. **GOOD COMMUNICATIONS ARE AT THE HEART OF ALL CLIENT ENGAGEMENT BEST PRACTICES.**
2. **BE SURE YOU AND THE CLIENT AGREE ON THE SUCCESS CRITERIA.**

> "What determines success depends on what the client thinks you're going to do."

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- When a problem occurs, you must tell the client immediately. People on the team often don't realize that the best way to gain the client's confidence is to tell the client team that you have an issue. Of course, it helps to have a recovery program worked out, as well. Sometimes, when an issue comes up, the team addresses it before the client is aware of it, and then the feel that it's not necessary to notify the client. That is a mistake.
- Throughout the implementation process, stay in close communication with your delivery team.
- Document everything.
- At the end of an engagement, always conduct a client satisfaction survey.

Abiding by these rules of engagement and not avoiding problems that come up along the way are the best ways to meet and exceed client expectations.

> "People on the team often don't realize that the best way to gain the client's confidence is telling the client team that you have an issue."

VALERIE JONES-HARVEY

Director, Account Services, Mindjet, LLC.

Valerie Jones-Harvey has been managing customer success and renewals teams for the past five years and managing projects for seven years. She loves working with data and currently works at Mindjet, based in San Francisco, where her focus is on helping customers use Mindjet's industry-leading mind-mapping solution, MindManager. When she's not at work, she loves spending time with her family, reading business books, and cooking.

Everybody emphasizes the importance of communication during project implementation, and rightly so. When the subject arises, however, discussion focuses on communication between the implementation team and the customer. I want to talk about internal communication.

I once learned a difficult lesson about what can happen when internal communication breaks down: sometimes, internal team members' needs can actually be more important than the customer's.

Here's the story. A company I once worked for was hired by a large entertainment group to integrate our software. The idea was to make our technology act as the engine behind the group's proprietary platform.

It was a high-priority project, and part of my role as program manager was to keep the customer up to speed. To avoid executives interrupting us constantly for progress updates, we built an executive dashboard.

That worked great—for the first couple of weeks. But as we got into the project's second month, things started to slip. We fell behind on the engineering side.

Suddenly, what had been a virtue—transparency—became a problem. Some of my team members felt we were broadcasting delays in ways that put their professional reputations on the line. Things got emotional.

KEY LESSONS

1. **INTERNAL COMMUNICATIONS AMONG TEAM MEMBERS IS OFTEN JUST AS IMPORTANT AS COMMUNICATING WITH THE CUSTOMER.**
2. **MANAGE CUSTOMER EXPECTATIONS BY PROVIDING KEY INFORMATION FIRST, SECONDARY INFORMATION AS NEEDED.**
3. **DON'T TAKE THINGS PERSONALLY.**

> "Suddenly, what had been a virtue—transparency—became a problem."

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Ironically, the customer was not particularly upset about the lag—at least not until dissension in our ranks caused other portions of the project to slip. We were missing deadlines that weren't even part of engineering development. So many people were in a defensive crouch that the job wasn't getting done.

We backed away from more frequent project updates and deemphasized news that made our team members feel compromised. We withheld nothing, but we didn't present bad news in boldface type, either. Eventually, things got back on track.

> "We withheld nothing, but we didn't present bad news in boldface type, either."

What did I learn from that experience?

- As important as it is to understand the customer's wants and needs, it's just as important to understand your team members' motivations.
- A good way to manage client expectations is to report to them what's most important first and information on secondary topics on an as-needed basis.
- Do not to take problems so personally.

Today, I pay much more attention to my team's internal dynamics. I'm eager to work closely with my people, even to the point of reorganizing schedules, if necessary, to make things work. In short, I'm much better at reading the room.

MEET WORKFRONT

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To learn more about Workfront Enterprise Work Management for professional services projects, and how it can help you control the chaos of work, please contact us at the following:

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