IT Customer Service
Teaching old dogs new tricks

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Identifying Your Key Customers
One of the best ways to ensure you are providing excellent customer service is to consistently meet or exceed the expectations of your key customers. In transitioning to a service-oriented environment, infrastructure professionals sometimes struggle with identifying who their key customers are. A frequent comment I hear in this regard is that since most all company employees in one way or another use IT services, then all company employees must be our key customers.

In reality, there usually are just a small number of key representative customers who can often serve as a barometer for good customer service and effective process improvements. For example, you may design a change management process that dozens or even hundreds of programmers may be required to use. But you would probably only need to involve a handful of key programmer representatives to assist in designing the process and measuring its effectiveness.

Various criteria exist to help in determining which of your numerous customers qualify as key customers. An IT department should identify those criteria that are the most suitable for identifying the key customers in their particular environment. Table 1-1 summarizes characteristics of key customers of a typical infrastructure followed by an explanation of each attribute.

Table 1-1 Characteristics of Key Customers of a Typical Infrastructure

1. Someone whose success critically depends on the services you provide.
2. Someone who, when satisfied, helps assure your success as an organization.
3. Someone who fairly and thoroughly represents large customer organizations.
4. Someone whose organization, or who themselves, is a large user of your services.
5. Someone who constructively and objectively critiques the quality of your services.
6. Someone who has significant impact on your company as a corporation.
7. Someone with whom you have mutually agreed upon reasonable expectations.

1. Someone whose success critically depends on the services you provide.
   Infrastructure groups typically serve a variety of departments within a Company. Some departments are more essential to the core business of the company than others just as some applications considered mission critical. The heads or designated leads of these departments are usually good candidates for key customers.

2. Someone who, when satisfied, assures your success as an organization.
   Some individuals hold positions of influence within a company and can help market the credibility of an infrastructure organization. These customers may be in significant staff positions such as those found in legal or public affairs departments. The high visibility of these positions may afford them the opportunity to highlight infrastructure achievements.

3. Someone who fairly and thoroughly represents large customer organizations.
   The very nature of some services provided by IT infrastructures result in these services being used by a large majority of a company's workforce. These include email and Internet services. An analysis of the volume of use of these services by departments can determine which groups are using which services the most. The heads or designated leads of these departments would likely be good key customer candidates.

4. Someone whose organization, or who themselves, is a large consumer of your services.
   Some departments are major users of IT services by the nature of their relationship within a company. For airline companies it may be the department in charge of the reservation system. For companies supplying overnight package deliveries the key department may be the one overseeing the package tracking system. Representatives from each of these groups were solid key customer candidates.

5. Someone who constructively and objectively critiques the quality of your services.
   A key customer may not always be associated with a department whose use of IT services is critical or high volume. A non-critical and low volume user may qualify as a key customer because of their keen insight into how an infrastructure may effectively improve their services. These individuals typically have both the ability and the willingness to offer candid, constructive criticism about how best to make IT services better.

6. Someone who has significant business impact on your company as a corporation.
   Marketing or sales department representatives in a manufacturing firm may contain these types of key customers. In aerospace or defense contracting companies it may be advanced technology groups. The common thread among these key customers is that their use of IT services can greatly advance the business position of the corporation.

7. Someone with whom you have mutually agreed upon reasonable expectations.
   Most any infrastructure user, both internal and external to either IT or its company, may qualify as a key customer if they have mutually agreed upon reasonable expectations. Conversely, customers whose expectations are not reasonable should usually be excluded as a key customer.

The issue of reasonable expectations is a salient point and cuts to the heart of sound customer service. When IT started getting serious about service it initially espoused many of the tenets of other service industries. Phrases such as the following were drilled into IT professionals at several of the companies at which I was employed:

"The customer is always right."
"Never say 'no' to a customer."
"Always meet your customers' expectations."

As seemingly obvious as these statements appear, the plain and simple fact is that rarely can you meet all of the expectations of all of your customers all of the time. The more truthful but less widely acknowledged fact is that customers sometimes are unreasonable in their expectations. IT service providers may actually be doing more of a dis-service to their customers and to themselves by not saying no to an unrealistic demand. This leads to the first of two universal truths I have come to embrace about customer service and expectations.

"An Unreasonable Expectation, Rigidly Demanded By an Uncompromising Customer, and Naively Agreed To By a Well-Intentioned Supplier, is One of the Major Causes of Poor Customer Service."

I have observed this scenario time and again within IT departments throughout various industries. In their zest to please customers and establish credibility for their organizations, IT professionals will agree to project schedules that cannot be met, availability levels that cannot be reached, response times that cannot be obtained, and budget amounts that cannot be reduced. Knowing when and how to say no to a customer is not an easy task, but there are techniques available to assist in negotiating and managing realistic expectations.

Negotiating and Managing Realistic Customer Expectations

While heading up an extensive IT customer service effort at a major defense contractor, my team and I developed a simple but effective methodology for negotiating and managing realistic customer expectations. The first part involved thorough preparation of face-to-face interviews with selected key customers, and the second part consisted of actually conducting the interview to negotiate and follow-up on realistic expectations.

Changing the mindset of IT professionals can be a challenging task. We were asking them to focus very intently on a small number of customers when for years they had emphasized doing almost the exact reverse. The criteria in the previous section helped immensely to limit their number of interviews to just a handful of key customers.
Getting the IT leads and managers to actually schedule the interviews was even more of a challenge for us.

This reluctance to interview key customers was puzzling to our team. These IT professionals had been interviewing many new hires for well over a year and had been conducting semi-annual performance reviews for most all of their staffs for some time. Yet we were hearing most every excuse under the sun as to why they could not conduct a face-to-face interview with key customers. Some wanted to conduct it over the phone, some wanted to send out surveys, others wanted to use email, and many simply claimed that endless phone tag and schedule conflict prevented successful get-togethers.

We knew that these face-to-face interviews with primary customers were the key to successfully negotiating reasonable expectations that in turn would lead to improved customer service. So we looked a little closer as to the reluctance to interview. What we discovered really surprised us. Most of our managers and leads believed the interviews could easily become confrontational unless only a few IT-friendly customers were involved. Many had received no formal training on effective interviewing techniques, and felt ill-equipped to deal with a potentially belligerent user. Very few thought that they could actually convince a skeptical user that some of their expectations may be unrealistic yet still come across as being service-oriented.

This turn of events temporarily changed our approach. We immediately set up an intense interview-training program for our lead and managers. It specifically emphasized how to deal with difficult customers. Traditional techniques such as open-ended questions, active listening, and restatements were combined with effective ways to cut off ramblers, negotiate compromise, and when to agree to disagree. We even developed some sample scripts for them to use as a guideline.

The training went quite well and proved to be very effective. Interviews with key customers began being conducted by leads and managers from all across our IT department. From the feedback we received about the interviews from both IT and our customers, we learned what most felt was the most effective part of the interview. We referred to it as the notion of *validate, negotiate, escalate.*

Within the guidelines of the prepared interview scripts we stressed to interviewers that they validate with their interviewees that were in fact key customers, that they did indeed critically need and use the services that we were supplying, and what were their current expectations for the levels of service provided.

If the expectations were reasonable and obtainable, then the type and frequency of measurements to be used were discussed and agreed upon. If the expectations were not reasonable, than negotiations, explanations and compromises were proposed. If these negotiations did not result in a satisfactory agreement, as would occasionally occur, then the interviewer would politely agree to disagree and more on to other matters.

Afterwards the interviewer would escalate the unsuccessful negotiation to his or her manager who would attempt to resolve it with the manager of the key customer. This method proved to be exceptionally effective at negotiating reasonable expectations and realistic service levels. The hidden benefits included clearer and more frequent communication with users, improved interviewing skills for leads and managers, increased credibility for the IT department, and more empathy of our users for some of the many constraints most all IT organizations work under.

This empathy that key customers were sharing with us leads me to the second universal truth I embrace concerning customer service and expectations:

"Most customers are forgiving of occasional poor service if reasonable attempts are made to explain the nature and cause of the problem, and what is being done to resolve and prevent it."

As simple and as obvious as this may sound, it still amazes me to see how often this basic concept is overlooked or ignored in IT organizations. We would all be better served if it was understood and used more frequently.

Integrating The Four Key Elements of Good Customer Service

We have discussed at some length the issues of identifying key customers and negotiating realistic expectations of service. There are two other key components involved with good customer service. These are key processes, and key suppliers. Understanding the relationships between these four entities can go a long way to ensuring high levels of service quality.

In Figure 1-1 we show the traditional model of a basic workflow process. Suppliers provide input of some type into a process. In the case of an IT Production Control department this could be data being fed into a program stream that is part of a job execution process, or database changes being fed into a Quality Assurance process. The output of the first process may be updated screens or printed reports for users, and the output of the second process would be updated database objects for programmers.

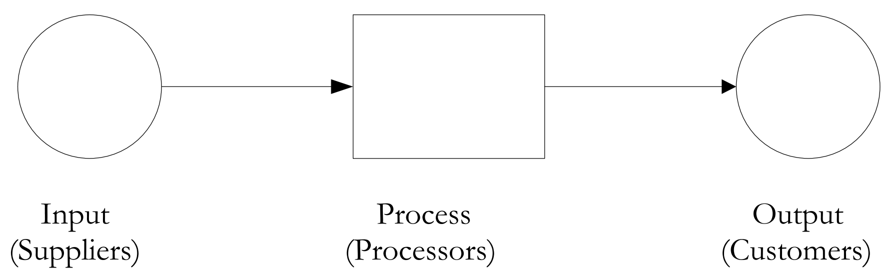

Figure 1-1 Traditional Work-Flow Process Model

The problem with the traditional workflow model is that it does not encourage any collaboration between suppliers, processors, and customers, nor does it measure anything about the efficiency of the process or the effectiveness of the service. In Figure 1-2 the model is revised in several aspects to improve the quality of customer service.

First, a key services box has been added to emphasize that the output of the process should result in a deliverable and measurable service that is critical to the success of the customer. Second, the flow of work between all four elements is shown going both ways to stress the importance of two-way communication between the individuals involved with each element. Third, each of the elements are designated as key elements to highlight the fact that while many customers and suppliers may be involved in a particular work-flow process, there are usually only a handful that significantly affect the quality of input and output.

A narrative interpretation of this workflow model in each direction may serve to clarify its use and importance. We will start first in the right-to-left direction. Key suppliers provide high quality input over into a key process. The streamlined key process acts upon the high quality input, ensuring each step of the activity adds value to the process, and results in delivering a key service to a key customer.

Next we will go in the left-to-right direction. In this case we start by identifying a key customer, then interviewing and negotiating reasonable expectations with this customer. The expectations should involve having key services delivered on time and in an acceptable manner. These services are typically critical to the success of the customer's work. Once the key services are identified, the key processes that produce these services are next identified. Finally, having determined which key processes are needed, the key suppliers that input to these processes are identified.

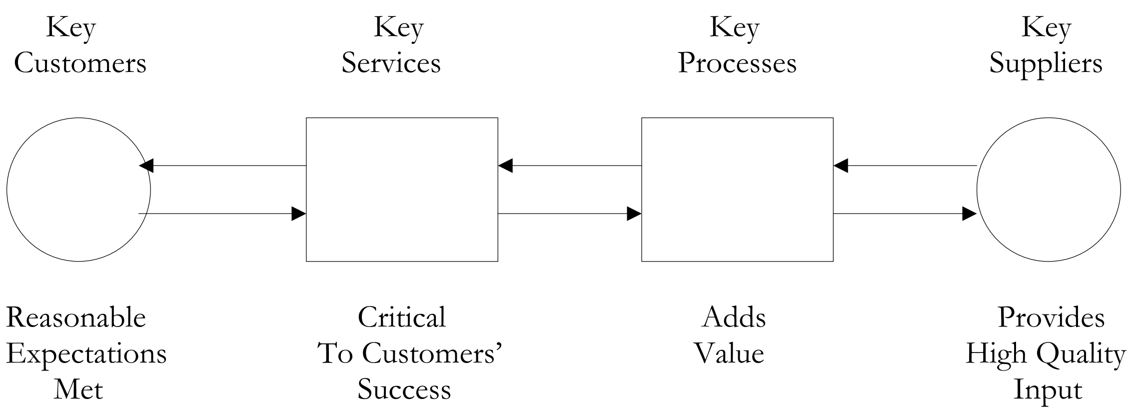

Figure 1-2   Revised Work-Flow Process Model

This revised workflow model serves as the basis for a powerful customer service technique we call a customer/supplier matrix. It involves identifying your key services, determining who are the key customers of them, seeing which key processes feed into the key services, and who are the key suppliers of these key processes. A more succinct way of saying this is:

> *Know* **who** *is using* **what***; and* **how** *it's being* **supplied.**

The *who* refers to your key customers. The *what* refers to your key services. The *how* refers to your key processes. The *supplied* refers to your key suppliers.

Figure 1-3 shows how a matrix of this type could be set up. The matrix is comprised of four partitions, each representing a key element of the relationship. The leftmost partition represents customers whose use of IT services is critical to their success and whose expectations are reasonable. The partition to the right of the customer box contains the IT services that are critical to a customer's success and whose delivery meets customer expectations. The next partition to the right shows the processes that produce the key services required of key customers. The last partition represents the suppliers who feed into the key processes

Key Customer	Key Services	Key Processes	Key Suppliers
Customers whose use of IT services is critical to their success and whose expectations are reasonable.	IT Services that are critical to a customer's success and whose delivery meets customer expectations.	Processes that produce the key services required of key customers.	Suppliers who feed into the key processes.

Figure 1-3 Customer/Supplier Marix

Figure 1-4 shows how the matrix is divided into two major partitions. The left half represents the customer-oriented phases and the right half represents the supplier-oriented phases.

Key Customer	Key Services	Key Processes	Key Suppliers
Customer-oriented	*Phases of the*	*Supplier-oriented*	*Phases of the*
Customer/Supplier	*Matrix*	*Customer/Supplier*	*Matrix*

Figure 1-4 Customer-oriented and Supplier-oriented Phases

In Figure 7-5 we show the two phases representing the human interaction phases. These are sometimes referred to as the external phases of the matrix.

Key Customer	Key Services	Key Processes	Key Suppliers
Human Interaction			*Human Interaction*
Phase			*Phase*

Figure 1-5 External Human Interaction Phases

Figure 1-6 show the two non-personal phases of the matrix representing process, technology and automation. These are sometimes referred to as the internal phases of the matrix.

Key Customer	Key Services	Key Processes	Key Suppliers
	Internal	*Non-personal*	
	Phases	*of the*	
	Customer/Supplier	*Matirx*	

Figure 1-6 Internal Non-personal Phases

A worthwhile enhancement to the base Customer/Supplier Matrix is shown in Figure 7-7. Here we add service and process metrics. The service metrics are negotiated with key customers to measure the quality of the services delivered as seen through the eyes of the customer. The process metrics are negotiated with key suppliers to measure the quality of the input they provide into key processes.

Key Customers	***Service Metrics***	Key Services	Key Processes	***Process Metrics***	Key Suppliers

Figure 1-7 Customer/Supplier Matrix with Service and Process Metrics

The Four Cardinal Sins That Undermine Good Customer Service

During my many years directing and consulting on infrastructure activities, I often lead teams on in search of how to improve the quality of good customer service. While these efforts produced many excellent suggestions on what to do right, including the use of the customer/supplier matrix, they also uncovered several common tendencies to avoid. I refer to these inadvertent transgressions as the four cardinal sins that undermine good customer service. They are summarized in Tables 1-2 and explained below.

Table 1-2 Four Cardinal Sins That Undermine Good Customer Service

1. Presuming your customers are satisfied because they are not complaining.
2. Presuming that you have no customers.
3. Measuring only what you want to measure to determine customer satisfaction.
4. Presuming that written Service Level Agreements (SLAs) will solve problems, prevent disutes and ensure great customer service.

1. Presuming your customers are satisfied because they are not complaining.
   This goes back to that old adage that says no news is good news. Nothing could be further from the truth when it comes to customer service. Study after study has stated, and my own personal experience has confirmed, that the overwhelming majority of customers do not complain about poor service. They usually either go elsewhere, or find alternate means, or complain to other users, or suffer silently in frustration. That is why pro-actively interviewing your key customers is so important.

2. Presuming that you have no customers.
   IT professionals working within their infrastructure sometimes feel they have no direct customers because they seldom interact with outside users. But everyone has a customer who is the direct recipient of their efforts. In the case of the infrastructure, many of these recipients are internal customers who work within IT, but they are customers nonetheless and need to be treated with the same high level of service as external customers.

   The same thinking applies to internal and external suppliers. Just because your direct supplier is internal to IT does not mean you are not entitled to the same high quality input that an external supplier would be expected to provide. One final but important thought on this is that you may often be an internal customer and supplier at the same time and need to know who your customers and suppliers are at what stage of a process.

3. Measuring only what you want to measure to determine customer satisfaction.
   The measurement of customer satisfaction comes from asking key customers directly. In addition to that, service and quality measurements should be based on what a customer sees as service quality, not what the supplier sees.

4. Presuming that written Service Level Agreements (SLAs) will solve problems, prevent disputes and ensure great customer service.
   A written SLA is only as effective as the collaboration with customers that went into it. Effective SLAs need to be developed jointly with customer and support groups, must be easily, reliably and accurately measured, and must be followed up with periodic customer meetings.