Optimizing IT Customer Service
By Harris Kern's Enterprise Computing Institute

IT organizations typically provide services to up to thousands of recipients. But limiting your user community to a handful of key customers, and negotiating realistic expectations with them, can improve the quality of services for all customers.

Consistently meeting or exceeding the expectations of your key customers is one of the best ways to ensure you are providing excellent customer service. 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 all company employees in one way or another use IT services, then all company employees must be our key customers.

Identifying Your Key Customers
In reality, there are usually just a small number of key customers who can 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 determine which of your numerous customers qualify as key. The following are seven common characteristics of key customers found in a typical infrastructure, although IT departments should identify those criteria that are the most suitable for their particular environment.

❑ **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 are considered mission critical. The heads or designated leads of these departments are usually good candidates for key customers.

❑ **Someone whose satisfaction 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.

❑ **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 e-mail, internet and intranet 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, provided they accurately reflect the views of the majority of these users.

❑ **Someone whose organization is a large consumer of your services.**
Some departments within a company are particularly major users of IT services by the nature of their business. For airlines, it may be the reservation and ticketing department. For companies supplying overnight package deliveries, the key department may be the one overseeing the package tracking system. When I headed up the primary IT infrastructure groups at a leading defense contractor and later at a major motion picture studio, the key IT user departments were Design Engineering and Theatrical Distribution, respectively. Representatives from each of these groups were solid key customer candidates.

❑ **Someone who constructively and objectively critiques the quality of your services.**
A key customer might 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 improve IT services.

❑ **Someone who can significantly influence the business impact of your company.**
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.

❑ **Someone with whom you share agreed upon reasonable expectations.**
Almost any infrastructure user, whether internal and external to either IT or its company, can qualify as a key customer if they have reasonable expectations. Conversely, customers whose expectations are unreasonable should not usually be considered key customers.

The old adage of "the squeaky wheel gets the grease" does not always apply in this case. The fact, often the reverse occurs. The loud voices of customers insisting on unreasonable expectations are often ignored in favor of listening to the constructive voices of more realistic users.

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 worked:

"The customer is always right."

"Never say 'no' to a customer."
"Always meet your customers' expectations."

As obvious as these statements may seem, the fact is that you can rarely 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 a dis-service to their customers and to themselves by not refusing 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, Demanded By an Uncompromising Customer, and 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 zeal to please customers and establish credibility for their organizations, IT professionals will agree to project schedules that cannot be kept, availability levels that cannot be reached, response times that cannot be met, and
budget amounts that cannot be maintained. 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 method for negotiating and managing realistic customer expectations. The first part involved thorough preparation for 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 just the 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 new hires for well over a year and had been conducting semi-annual performance reviews for most of their staffs for some time. Yet we were hearing almost 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 e-mail, and many simply claimed that endless phone tag and schedule conflicts prevented successful get-togethers.

We knew that these face-to-face interviews with primary customers were the key to negotiating reasonable expectations that in turn would lead to improved customer service. So we looked a little more closely at 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 might be unrealistic, yet still be considered service-oriented.

This realization temporarily changed our approach. We immediately set up an intense interview-training program for our leads and managers, which 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 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, and escalate*.

We stressed to interviewers that when their interviewees were in fact key customers, they should validate that the customer did indeed critically need and use the services that we were supplying and ask about 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 move 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 from our users for some of the many constraints most 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 it and prevent reoccurrences."

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

But one of the best ways that IT infrastructures can provide quality services is to identify their key customers and negotiate with them reasonable expectations. Once those are agreed upon, and consistently met, then IT customer service can truly be optimized.