A Customer Centricity White Paper

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# Customer Advocacy

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## Contents



# Overview

Many companies have inquired about Customer Advocacy. This is an essential component of becoming customer centric – especially if the products and services you offer are complex and customer interfaces spread out among various units within your organization.

In this whitepaper, we discuss what Customer Advocacy is (and isn't), a framework for implementing it, and how to go beyond reactive behavior and get into the hearts and minds of your customers.

## Introduction

Customer Centricity has recently received a number of inquiries from clients and prospects regarding the topic of "Customer Advocacy." Recognizing that this may reflect a need of many of our customers and newsletter subscribers, we have written this whitepaper divided into 3 sections:

### *What is Customer Advocacy?*

Here, we will discuss what Customer Advocacy is – and is not – along with practical advice on how to implement this function and how to avoid potential pitfalls.

### *The Customer Advocacy Process Framework*

Next, we will offer a framework to provide structure to the Customer Advocacy function so that all the groups involved know what the processes are, who can engage them, and what the expectations are along the way to resolving the customer situation.

### *Getting Into the Hearts and Minds of Your Customers*

Finally, we examine what it takes to move beyond the reactive and into the proactive mode of operation – looking at ways to improve processes, communications, and project management – to ensure that fewer customer issues require escalation to the Customer Advocate.

 

# Part I – What is Customer Advocacy?

In this section, we will discuss what Customer Advocacy is – and is not – along with practical advice on how to implement this function and how to avoid potential pitfalls. This discussion covers 3 areas:

- Why the need?
- What it is / isn't
- Key skills required

As we discuss these, we will also point out potential pitfalls and how to avoid them as well as ways of accelerating the process.

## *Customer Advocacy - Why the Need?*

The need for a Customer Advocacy function typically results from the reality that a lot of people at a firm affect the customer experience and the perception that a customer has of the firm. In these scenarios, the "entire customer experience" is often not managed and the customer is exposed to the organization's complexities, gaps and/or inefficiencies. The customer is then required to apply extra effort to navigate the organization to get things done or get issues resolved.

Not only does this impact the customer's experience with your firm, but it also causes significant inefficiencies including:

- Multiple people investing redundant efforts working on the same customer issue
- Sales people spending too much time fire-fighting and not enough time selling

A useful response and strategy to address this situation is to put in place a function that considers the "entire customer experience" – the Customer Advocate. This can be both a stop-gap and long-term measure to improve customer satisfaction, retention and most importantly, profitability.

To determine if your firm could benefit from implementing a customer advocacy function, ask yourself:

- Do we have a complex organizational structure that the customer must navigate to get things done?
- Do we have complex product/service offerings that require multiple people to "touch" the customer?
- Is our firm made up of stovepipe organizations that were designed for departmental / product specific efficiencies and not necessarily "customer success?"
- Are our customers' experiences being managed holistically?
- Is our sales staff spending too much time fire-fighting and not enough time selling?
- Do I ever hear the following customer comments:
    - "Your firm is so difficult to work with"

 

- "Each time I call I feel like I'm talking to a different company"
- "I need to re-explain the situation to each person I talk to"

If any of the above are true for your firm, then implementing a Customer Advocacy function may provide you significant benefits!

## *Customer Advocacy – What Is It?*

Customer Advocacy is a function that focuses on the customer, not an individual department, organization or division of a company. Many companies are recognizing the importance of "customer centricity" and the implied customer focus and are thus choosing to implement a Customer Advocacy role. In fact, well known Cisco Systems refers to their entire Customer Care/Customer Service function as Customer Advocacy – empowerment on a wide scale! In our discussion, however, we are going to discuss Customer Advocacy within the context of handling exception situations, those that tend to be escalated, complicated and challenging to resolve.

For the purposes of this discussion, we will define Customer Advocacy as follows:

> *A cross-functional role empowered to marshal organizational resources to resolve troublesome customer issues and identify root cause while balancing the financial realities and strategic goals of the company.*

### Cross-Functional Go-To Person

Customer Advocacy is engaged when all else has failed the customer. In this capacity, a Customer Advocate becomes the customer's "single throat to choke." The key role they must play, as far as the customer is concerned, is that of ensuring the firm fulfills on its commitments. As such, the Customer Advocate must carefully "manage" the customer's expectations, which may require that customer expectations be reset based upon the realities of the situation.

To achieve resolution, the Customer Advocate may need to escalate (hierarchically and/or cross-functionally) within an organization until full ownership and accountability are obtained. Said another way, the Customer Advocate will relentlessly drive resolution which may require resources and/or agreement across several departments.

### Getting to the Root of the Matter

To facilitate resolution, the Customer Advocate will be required to "get all the liars in the same room" to facilitate cross-functional dialog. During this process, the Customer Advocate will note any items related to root cause, which could include broken or non-existent processes, a product-related issue, or simple miscommunications. Once the immediate customer issue is resolved, the Customer Advocate will provide information in a format that allows roll-up analysis and links directly to performance and service improvement plans. Without this root cause analysis and subsequent follow-up, the firm is likely to see the situation recur for the same or other customers.

### Expectations and Reality

A key role for the Customer Advocate is to manage the customer's experience "through" resolution of a troublesome situation. As such, he or she is responsible for keeping the customer up-to-date on the situation as it is being handled. This requires clearly setting customer expectations and providing timely updates, regardless of status. Doing so establishes a level of creditability that is rooted in reality. Reality, not quoted service levels or other standard responses, is of the utmost importance. This requires an "opening of the kimono." Remember, these situations have already gone through normal channels, passed quoted service levels and exhausted escalation paths. The goal is for this process to bring the firm back into the "good graces" of the customer.

To achieve this, it is crucial to frequently (weekly, daily or more) communicate to the customer on the progress being made. Additionally, if/when something goes off track, it is the Customer Advocate's job to update the customer accordingly. This will require that the entire organization line-up behind the Customer Advocate, rather than having each individual in the organization bombard the customer with incremental information. With this alignment, the Customer Advocate can provide a comprehensive update (hopefully, most all of which is good) and, at the same time, share a "blip that has occurred" within the context of the greater good that is occurring to resolve the customer situation.

### On the Bus or Under It

From a practical standpoint, having a Customer Advocate unleashed on your department or division isn't exactly fun. In fact, from the perspective of a departmental leader/manager, it is often downright uncomfortable – and it should be! The Customer Advocate has the customer's best interest in mind (not necessarily yours) and is engaged because something is not working – part of which may be owned by you. As such, it is important for the Customer Advocacy function to have complete Senior Management air cover to make or recommend improvements.

It helps to consider the following perspectives with regards to Customer Advocacy:

- If you are championing the creation of a Customer Advocacy function, expect resistance. There are plenty of folks deeply rooted, their position buoyed by broken process, problems or 'cross functional issues.' For these folks, fixing root cause issues reduces job security.
- If a Customer Advocate engages you, it is for the larger good of the customer and, therefore, the company. Customer Advocates have the advantage of providing views from multiple perspectives. As such, seize the opportunity for betterment – it will benefit your customer (and your team).

Ultimately, the Customer Advocate's goal is to address the immediate customer issue in a highly responsive manner, proactively identify the root-cause and (if possible) provide recommendations for resolution to prevent a similar issue from recurring.

## *Customer Advocacy – What It's Not*

In the previous section, we discussed what Customer Advocacy is. We will now help to further clarify the role by adding details about what Customer Advocacy is not.

### A Customer Doormat

Customer Advocacy is not a doormat for the customer to walk all over to get an automatic 'yes'. Instead, Customer Advocates must use their best judgment and knowledge about situations to determine the extent to which resources will be engaged. Further, as the centerpiece in situational communication, the Customer Advocate must tell it like it is. For instance, if the resolution time is unknown, then explain such while creating room (time) for the organization to respond. Customer

Advocacy is not about agreeing with a customer's demands; it is about managing the customer's expectations against the reality of the situation.

**The "Sky is Falling" Alert**

Customer Advocacy is not a role that justifies running around the organization yelling "the sky is falling." Rather, it is a role where practical results of procedures are studied and lessons learned are used through a roll-up reporting process to drive continuous improvement. As a reminder, situations which land in the Customer Advocate's lap have gone through normal channels, but failed the customer. Therefore, prompt and direct attention to the matter is required while not exasperating the organization.

**A Translator**

Customer Advocacy is not a translator, "middle-man" or interpreter for the rest of the organization. Rather, Customer Advocates are facilitators who engage the appropriate subject matter experts into a resolution team, which will often require direct engagement with the customer. Simply put, once Customer Advocacy is involved, the time to read from manuals, scripts or leverage cursory knowledge has passed; it is time for the experts to be front and center. An important note: requiring non-customer facing personnel to work directly with customers requires teamwork, practice and live management - topics we will cover later in our discussion.

**Band Aid Role**

Customer Advocacy is not just a band aid — IF accompanied with management attention and a framework for continuous improvement. Without these key items, the Customer Advocacy role may become a disruptor (constantly addressing the same issues) and will not return the benefits of increased customer satisfaction.

Now that we have a solid definition for Customer Advocacy, we will now move our discussion to address key aspects of an effective and responsive Customer Advocate function, inclusive of people (structure), process and technology.

## *Key Skills for the Customer Advocate*

As we've been discussing thus far, Customer Advocacy is a highly responsive process and/or role engaged to handle exception (even escalated) customer situations. This results from the reality that many companies have an acute need for such a process, role and/or function. Creating a Customer Advocacy process or organization requires a number of key steps, including obtaining enterprise wide commitment (and necessary air cover) and aligning people, structure, process and technology. We will next focus on some of the key skills and abilities of the highly successful Customer Advocate.

Building upon the reality that a Customer Advocate will frequently find him/herself in responsive/reactive scenarios, the two-word phrase we would use to describe this role is: "Hostage Negotiator." The Customer Advocate must have the ability to enter into emotionally charged situations between multiple departments of your firm, the customer's organization and potentially third-party vendors. The first thing that a Customer Advocate must do is "peel people off the ceiling" to get everyone to understand that the situation is recognized (the first step of recovery) and very important, so that the "team" can determine the best course of action to get things back on track.

There are several key skills required to enable this. While each of these is deserving of its own seminar, we will only cover them at a high-level here.

**Straight Forward and Honest**

The ability to deliver good news (easy) and bad news (not so easy) in such a way that demonstrates to the customer that their best interests are being represented, effort is being invested and forward progress is being made. This is vital to building chits, or credits, so to speak, which can be used (when needed) throughout resolution or at a later date.

**Interpersonal Management and Communications**

Customer Advocacy requires a high-degree of finesse in getting things done with and through other people. The Customer Advocate must not only demonstrate effective communications and interpersonal relations him/herself, but he/she must also make sure that all individuals involved in the situation are communicating effectively. While this is a subject deserving its own seminar, here is a crude example: The customer might say "I want a blue pen." Sounds like a simple request. The seasoned Customer Advocate would respond with "Would you like us to provide a pen with a blue case, a pen with blue ink or a pen with both a blue case and blue ink?"

**Good Business Sense and Judgment**

The Customer Advocate must grasp the concept that the enterprise is engaged in profit making activities. This may seem like a no-brainer, but at some point someone has to say, "Enough" or "Not Enough." That someone is the Customer Advocate. The Customer Advocate must be able to make decisions or drive the decision-making process as necessary, willing to assume authority when no one else can or will make a decision.

**Organizational Navigation**

The ability to navigate the organization is crucial. While coaching baseball, we teach the kids the following. When you are in position (say short-stop) you need to think about what you are going to do when the ball comes to you (prior to the pitch being thrown). Don't wait until the ball is hit, or in your glove. You will only waste time, create confusion and let down your team. This concept applies equally for the Customer Advocate. Additionally, your Customer Advocate cannot have any inhibitions about contacting the right person (in your organization, that of a vendor or a customer), regardless of rank, to engage on a situation.

**Executive Presence**

A reality is that a Customer Advocate will find him/herself interfacing with people at all levels of your, and your customer's, organization. An important area that a Customer Advocate must interface well with is the executive level. This requires the Customer Advocate to be a master at organizing what may be very complex information into business terms and realities, to support a *business*, not a technical, discussion. The Customer Advocate must also be well composed and confident, as he/she will be representing your firm in the eyes of the senior decision makers at your customer's organization.

 

### Time Management

The ability to manage time and associated expectations is critical. The Customer Advocate must be prompt (the first one to the meeting) and follow-up by doing precisely what he/she committed to doing (complete tasks and activities on time, every time).

### Project Management

The Customer Advocate is usually engaged when the many "moving parts" in your organization don't come together to meet the customer's expectations. As such, the Customer Advocate must put together and manage the customer's multi-faceted "get well plan."

Finally, the Customer Advocate must be empathetic yet firm; calm yet assertive; decisive yet respectful.

## Part II – The Customer Advocacy Process Framework

Customer Advocacy is a journey, not a destination. So far in this discussion, we have defined what Customer Advocacy is and isn't, and we have discussed the required skills and abilities of the successful Customer Advocate. We will now begin discussing the process framework to ensure a level of discipline, methodology, and most importantly, continuous improvement in addressing critical customer issues.

The Customer Advocate process framework involves the following:

- Customer segmentation
- Engagement process
- Escalation process
- Response planning, analysis and execution
- Managing the customer experience through resolution
- Internal management review

We will examine each of these in detail in the following sections.

### *Customer Segmentation*

The first step in determining how best to align Customer Advocate resources to "respond" to customer situations is to define (or leverage) your customer segmentation model. The reality is not all customers are created equal. If you haven't read "Angel Customers and Demon Customers" by Larry Selden and Geoffrey Colvin, get a copy.

Every customer deserves an "appropriate" level of support. However, not every customer deserves the "same" level of support. A strategic account (based upon name recognition, revenue and/or breadth of products purchased) may warrant your most seasoned resource(s) being 100% dedicated to addressing situations that impact the account. A client on the other end of the spectrum (that provides minimal to no profit margin - yes, they exist at your firm too!) may simply need to live with standard operating procedures. Alternatively, you may wish to engage "less-seasoned" resources on those accounts that are on this end of the profitability spectrum.

How, then, do you make the customer advocate "offering" available to your customer-base? We typically suggest one of two approaches, depending on the need and resource availability.

1. Offer to the entire customer-base, or a specific subset thereof - Make the customer aware that "If ever you feel we are not meeting your expectations, or that an exception has occurred and our standard operating procedures have failed you, feel free to engage a customer advocate." Of course, you will want to couch this with a statement about your commitment to quality and responsiveness. Remember, we are covering this subject because the savvy customer already knows there are challenges and exception situations that DEMAND a customer advocate. So, put it out there along with your commitment to continuously improve.

2. Only engage a customer advocate when specific account situations warrant such a response.

### *Engagement Process*

Now that you know which customers warrant the engagement of a customer advocate, we will now discuss the process for doing so. Basic guidelines that we recommend include the following:

- Employee observes a troublesome account situation. This may include the customer expressing comments such as:
    - "I've already spoken to 3+ people at your firm. I'm sick of re-explaining myself."
    - "Who then, CAN I talk to, to resolve this issue!?"
    - "I'm going to cancel (sue, etc.) if this issue isn't resolved IMMEDIATELY!"
    - "We have been unable to conduct business for several hours."
- Customer expresses extreme dissatisfaction in the context of a survey.
- Customer specifically requests that a customer advocate be engaged.

The next step is determining when (time of day, or night) to engage a customer advocate. For urgent matters (the customer is "presently impacted" / unable to conduct business, etc.), it is appropriate to engage a customer advocate on a 24x7 basis. For non-urgent matters (which may include responding to a situation that has since "passed" for which the customer demands a get well plan assuring it will not recur), engaging a customer advocate during normal business hours may be fine.

The final concern with regards to the engagement process is determining when it is appropriate to disengage. This agreement should be established with the customer up-front. This is accomplished by first confirming with the customer the true nature of the situation and what it will take to get things back on track. Next, set the expectation with the customer that once this issue is resolved AND irreversible corrective action has been put in place, standard operating procedures should again suffice. At that time, but not until then, the customer advocate will disengage. In summary, you don't want the customer advocate to become the *de facto* account manager; there needs to be a clear beginning and end of the process.

While there are other considerations and nuances, the above framework will get you started with your Customer Advocate engagement process.

### *Escalation Process*

Once engaged, the Customer Advocate will need to reach out to the appropriate subject matter experts to assist in responding to the customer situation. This requires that a "who to call list" is pre-established, with a comprehensive listing of:

- Each subject matter or support area (e.g., sales, engineering, product management, legal, technical support, finance, professional services, etc.) that the Customer Advocate will depend upon
- Name of the primary point of contact, backup, manager, director, vice president for each area
- 24x7 contact information for each person in the hierarchy

This will be one of the most valuable assets that a customer advocate will have to enable prompt engagement of necessary resources.

With any process, it is expected that exceptions will occur. Gracefully handling exceptions is key to minimizing impact to the customer and the business. As relates to the Customer Advocacy framework, it may become important to escalate a particular customer issue for a number of reasons, including:

- Promoting management awareness of a particular customer or product situation that warrants attention, either based upon best judgment of the Customer Advocate, or a pre-established escalation request for that particular customer or product.
- Primary point of contact in a support organization is unresponsive to engagement requests from the customer advocate. Person could be out of cell range, indisposed, or otherwise unavailable.

For real-time issues needing immediate attention and support from a particular subject matter (or support) area, the Customer Advocate will attempt contact with the first designated person on the "who to call list" for that area. Should that person not respond within 15 (+/-) minutes, the Customer Advocate will then attempt contact with the next person on the list for that area, and so on up to and including (if necessary) the VP.

Taking this approach ensures that all subject matter areas/support organizations are fully aligned to the Customer Advocate model. Rest assured that the VP will not tolerate calls at 2AM resulting from his/her staff being unresponsive to customer issues. Additionally, by "sharing the pain" the subject matter areas/support organizations will be increasingly motivated to resolve the root-cause of issues requiring escalation.

## *Response Planning, Analysis and Execution*

Now that the Customer Advocate has successfully engaged subject matter experts necessary to address the situation, the next step is to "get all the liars in the same room" (or on a con-call). The objective here is to clarify the situation, determine what the problem is (based upon information gathered thus far), determine how we got here (in a non-accusatory way), what the options are and a potential course of action. This may require that individuals pull performance reports, a history of customer inquiries and problem reports, invoices, contracts, etc., to create a chronology of the timeline leading up to the point of customer dissatisfaction. The output of this step is a first draft Situation Summary, which includes:

- Executive Summary - Top-level summary of the situation
- Chronology - Timeline of events
- Root-Cause(s) - Item(s) identified (thus far) that are foundational to the issue at hand
- Contributing Factors - Related factors that, while not root-cause, may have exasperated the situation and/or contributed to the "swirl" factor. For our purposes, “swirl” is defined as a situation where a number of people become (unnecessarily) "spun up" and emotionally charged.
- Action-Plan and Recommendations

After a first pass has been completed, the next step is to re-engage with the customer, in order to effectively manage the customer's experience through resolution.

### *Managing the Customer Experience*

In preparation for the customer meeting, you will want to hold a "dry-run" with all participants from your firm (and necessary 3rd parties whom you rely upon to deliver the ultimate customer solution). During this rehearsal, you should walk through the meeting agenda and situation summary asking each participant to cover his/her part "as if" he/she were in front of the customer. You'll frequently identify items that require additional investigation, or phraseology that detracts from the message (which is "intended" to again create confidence in the eyes of the customer).

Depending on the nature and impact of the incident, you may want to bring senior management of your firm into the initial call or meeting to emphasize the level of attention the situation is receiving and demonstrate the level of commitment and importance being placed on getting things "back on track."

As you are recounting the sequence of events that caused the customer situation, be clear in sharing the contributing factors, some of which may be owned by the customer. You'll obviously need to use a high-degree of tact and diplomacy in doing so, but you MUST provide full disclosure to prevent the same situation from recurring.

One thing you might discover when investigating root-cause and contributing factors is that the client hasn't (yet) purchased a service or feature that you offer to mitigate the risk (directly or indirectly) of the customer's situation happening. If this is the case, share with the customer the benefit of purchasing the service or feature to prevent such situations from occurring again in the future. This can be a very delicate topic as a client may have had the expectation that it was covered in the original agreement, in which case expectations must be reset. One approach to take is to offer the service or feature for a free trial period, say 90 days, with the expectation that the customer will clearly observe the benefits and ultimately pay for the service on a go-forward basis. However, you must also make it clear that if the client has not committed to purchasing the service at the end of trial period, the service will be "turned off" and the incident under present review is likely to recur. Take this opportunity to define the ROI by asking the client details regarding the impact of the incident (on customer satisfaction, employee morale, company image, revenue, lost opportunity, etc.). Compare the impact with the investment required to retain the service and you have likely "made the sale."

You should also clearly establish criteria for closing out the incident and turning the customer back over to standard operating procedures (SOP). The "get well plan" may require a few days or a few months, but clearly setting expectations and criteria for success *at the outset* is critical.

Throughout the lifecycle of the escalated event, it is important to identify and reinforce the silver lining. That is, the progress being made, resources engaged, management awareness and additional value that you may be delivering within the overall context of the organization's response. In a nutshell, reinforce "what we are doing right" without making light of the incident that caused you to respond in such a manner.

Finally, once the criteria for success have been accomplished, you will want to confirm with the customer and agree to close out the incident. If there is disagreement, you will want to go back to the previously agreed to success criteria and determine which items are of concern. You may learn that a similar or somewhat related incident has occurred which places doubt in the mind of the customer that root-cause resolution has taken place. Clearly establish what is and what is not related to the original incident; if necessary, you may need to start the process again for a separate but similar incident. The goal here is to prevent "open-ended" customer advocacy engagements in such a way that requires your resources to remain "spun-up" when standard operating procedures will suffice for the customer (which is where you want to be).

## *Internal Management Review*

Internal Management Review is a critical aspect of the Customer Advocacy framework that ensures senior management is aware of:

- At-risk (even explosive) account situations so that decisions can be made about engaging the customer to demonstrate the level of internal awareness of the situation and the commitment to resolve the matter
- Progress being made to resolve the customer situation, to enable senior management to assign greater attention and resources if things are not on track
- Root-cause issues that disrupt the customer experience and the business so that appropriate attention can be given to root-cause resolution
- The costs to the business resulting from escalated customer situations
- The effectiveness of the process and the organization's response to the situation

To address the above objectives, we will now cover the components of internal management review: meetings and supporting tasks.

### Internal Review Meeting

Like any meeting, the internal review meeting is most effective with the right participants, frequency, and agenda.

Participation - Participation in the internal review meeting consists of customer advocates who are actively engaged in a customer situation. Mandatory participation will typically include senior management (Director, VP and above) from Sales (Account Management), Service, Technical Support, Professional Services, Engineering and other organizations that have a direct impact on the customer experience. Other participants are requested on an as-needed basis.

Frequency - The internal management review meeting is typically conducted on a weekly basis, but may be adjusted to occur more or less frequently depending on the nature and volume of escalated customer situations at your firm.

Agenda - The agenda will include a review of all issues that have required Customer Advocacy engagement. During the meeting, the team will review new situations, provide a situation update (progress and conditions that may have transpired to exasperate the situation) on previously identified items and finally confirm which situations have been closed out.

**Supporting Tasks**

During the review process, it is important to identify factors contributing to the situation, obstacles to resolution of the immediate issue and support needed to achieve timely closure. Once the immediate customer situation has been addressed, it is then important to obtain management commitment to put in place the improvements necessary to resolve the root-cause issues and a date that an update will be provided to the group on progress against that commitment.

Documentation - The main documents that will support this review include the list of open Customer Advocacy engagements and the individual situation summaries prepared by the respective Customer Advocates.

Measurement - The following measurement criteria are suggested to monitor (and demonstrate) the effectiveness of the process and the impact sustained by the business because of the need to engage a customer advocate:

- Ratio of customers to Customer Advocacy engagements. This measurement will help determine if there are increasingly fewer Customer Advocacy engagements as your customer base continues to grow.
- Count of Customer Advocacy engagements by "reason for engagement." This measurement will help determine if the root-cause issues are being resolved and where attention is warranted.
- Duration of Customer Advocacy engagements. This will help determine if you are responding in a timely manner to resolve escalated customer situations and the right resources are being applied.
- Customer Advocacy engagements by customer segment, business unit and product line. This will identify any troublesome trends with regards to a customer segment, business unit or product line that needs heightened attention to ensure customer retention and ongoing profitability.
- Level of effort and expenses incurred as a result of each engagement. Quantifying the impact (from a dollars and cents perspective) is the icing on the cake to ensure effective prioritization of initiatives that will need to be undertaken to resolve root-cause issues.

Up to this point, we have discussed the reactive/responsive aspects of Customer Advocacy, which is often required by firms as they embark on the journey of improving their customers' experiences. By implementing a process similar to that which we have described, you will ensure that escalated customer issues are responded to in a consistent, methodical and timely manner. And, more importantly, that root-cause resolution takes place to ensure that similar incidents don't occur to the same or additional customers. The result: increased customer satisfaction and retention along with improved operational efficiencies that provide a direct impact on profitability!

We will now will begin covering the proactive aspects of customer advocacy, enabling you to get into the heart and mind of your customer to build long-term profitable relationships.

# Part III – Getting Into the Heart and Mind of Your Customer

I recently attended a seminar in which the name of one of my clients (an MSP) came up. The speaker posed a question, something to the effect of "why do people buy from [MSP]?" The response to the question included NOTHING about the firm's products, services, features, functions, pricing, people, leading edge technology, massive data centers, global presence, or multi-decade experience in the industry. NOTHING. The overwhelming response from the attendees (customers of this MSP) was "TRUST." Pure and simple trust. "I trust that [MSP] will take care of my business." Powerful!

To be clear, your products, services, people, technology, etc. are table stakes to be in the business you are in. But, if that's all you've got, you have been, or soon will become, commoditized, competing solely on price. Not a place you want to be.

The question then becomes: "How do I earn trust (to be able to get into the heart and mind of my customer)?" Do you earn trust by making promises? No. You earn trust by thinking and acting in the best interests of your customer. And, you do what you said you would do.

By now, you recognize the reasons why Customer Advocacy is important. As we explore going beyond the reactive, we will focus on sharing how to create a proactive Customer Advocacy mind-set that should be instilled in every customer-facing employee in your firm.

## *Customer Advocacy Model*

What is a proactive Customer Advocate? Someone who:

- Is an internal champion for the client
- Knows the clients' businesses well enough to represent their needs to the many departments and personnel within the firm
- Ensures a mutually profitable relationship

Anyone in a firm who "touches" the customer can and should be a Customer Advocate. To do this effectively requires a set of tools and skills associated with each level of engagement with the client:

- <u>Individual interactions (One and done)</u> - How to achieve mutual understanding within simple customer interactions to ensure needs and expectations are met or exceeded, and how to treat every customer interaction as part of a bigger (relationship) picture.
- <u>Transactional interactions</u> - How to be the "good shepherd," ensuring that you (or your firm) follows through on what was promised to the customer (issue resolution, answer to a question, processing of an order, etc.).
- <u>Projects</u> - How to orchestrate holistic delivery of a multi-faceted solution involving multiple interrelated tasks and activities of resources from multiple firms (yours, the customer and potentially 3rd party vendors) while buffering the client from the inherent complexities.
- <u>Relationship</u> - How to foster a relationship of a "mutual exchange of value," both by reflecting on "where we have been?" in the relationship, to build upon

what has worked and improve on areas needing attention, and by projecting into the future "where will this relationship be in 2-4 years?"

- Evolution - How to take the firm to the next level by internalizing the customer's feedback on the firm's performance and understanding their current and future business needs, and responding to position yourself as a long-term strategic partner for your customer.

## *Individual Interactions*

We refer to "individual interactions" as those seemingly routine, minor and stand-alone interactions with our customers, such as a phone call, voice mail message, email, or letter, for which we simply owe a response. The inquiry could relate to a question, problem, etc. that can be immediately responded to and/or resolved. And, our response closes out the interaction.

The brutal reality is that too often customer relationships completely unravel because of botched individual interactions. Why? Because two principles are not adhered to:

1. Ensure mutual understanding during each customer interaction
2. Recognize that a bigger picture exists (everything is related; nothing is stand-alone)

## *Ensuring Mutual Understanding*

Just to warn you, what follows may be an uncomfortable set of questions. The first question: Who is responsible for ensuring that the other person understands what you are saying? The answer: You are! And, the second question: Who is responsible for ensuring that you understand what the other person is communicating? The answer: You are!

You might say "That seems unfair. Why am I responsible for the success of the communication in both cases and the other person is not?" I'm writing this assuming that you are (or want to be) a professional. If you want to be perceived as an exceptionally talented person, realize that you are responsible for ensuring mutual understanding within all communications in which you participate, whether you are the transmitter or receiver of information. Period.

How do you ensure that mutual understanding exists during each interaction you are involved in? Through effective use of some basic interpersonal communication skills.

### Making Sure the Receiver Understands You

When you must be absolutely sure that the other person "understands" what you are communicating, ask that person to repeat back their understanding. For example, you might say something to the effect of: "Sue, I know we just talked about a lot of things. I just want to make sure we are on the same page about what we just discussed. Could you repeat back to me your understanding [of the situation]?"

Here is an example that many of us can relate to. The scene: Your teenager is playing XBOX. You need him or her to do a few chores and finish homework. You ask "Could you clean your room, take out the garbage and finish your homework before you go out with your friends?" The response you receive is a simple "O.K." An hour later, when friends are at the door, what has been accomplished? Nothing. When you indicate that your child cannot go out with friends because chores and homework aren't complete, you hear "What are you talking about?" as your child looks at you like you have two heads.

While we'd all like to assume that adults are more advanced in their listening skills, we too often observe that because of distractions, multiple priorities or incomplete information provided by us, that we meet with the same end: ineffective communications resulting in a less than desirable outcome.

To avoid this, recognize the reality that until the receiver of information can repeat back in his/her own words what he/she has heard, to your satisfaction, you have not been heard. In the case of your teenager, it will likely mean you need to stand in front of the TV (blocking the game), restate what you asked to be done and have him or her repeat back what you said. Then, and only then, will the XBOX go off and chores begin.

**Making Sure You Understand**

When you need to ensure your understanding of what someone is communicating to you, you too can use the technique outlined above, of repeating back in your own words your understanding of what the other person said. However, doing so prematurely may result in your sharing an incomplete (even) shallow understanding. As such, you are first encouraged to clarify what the person has said by seeking additional information about the "what and why." How often has someone (a customer or otherwise) told you what they wanted, which was something you could not or were not prepared to deliver on as it wasn't an option or capability available to you. However, once you asked a few probing questions about the "why" you learned that what was needed was something altogether different. And, the true need was something that you COULD deliver on. Once you have asked the appropriate set of questions to ensure your understanding of the "what and why," you can then make your attempt at repeating back what your understanding of the situation is.

An example (keeping with the teenager theme): Has your teenager ever indicated to you: "I need some money." Or, "I need $15." If you are like me, your first reaction might be to say "no" or "what did you do with last week's allowance" or "I'll pay you $15 for taking care of the following (larger than average) chore." Your child's response may be something like "never mind." However, with further probing, you learn that the reason he or she needs $15 is to get a haircut for school pictures which are scheduled for tomorrow. Recognizing that your child's hair is a bit straggly, you are MORE than happy to provide the necessary funding so that your child's hair looks well-kempt for school pictures.

In summary, when you need to ensure your understanding of what someone is communicating so that you can act or make a decision, and/or your first reaction is to reject, ignore or disagree with what is being said, first clarify by seeking additional information about the what and why. Effective interpersonal communications skills are applicable in every aspect of your personal and professional life. That is, they work far beyond customer interactions.

## *A Bigger Picture Exists*

As we previously discussed, customer relationships too often unravel because of botched individual interactions. While individual interactions might seem minor and fairly routine, they should never be viewed in isolation, but rather as part of a bigger picture.

Have you ever seen an email chain similar to this?

Customer (end-user): *Last week I called you about the device not working. You sent me a replacement that also doesn't work.*

Product Company (Customer Support Representative): *Our policy is to do a quality check before we ship. The device worked prior to shipping. Are you sure you are using it properly?*

Customer: *Yes, I know how to use the device. I've been using it for years now. Can you please resolve this matter?*

Product Company: *Our policy upon receiving faulty items from customers is that we do a test to confirm the item is not working. I just reviewed the results of the test on your returned device and we found it to be working. As such, I'd like to suggest you take one of our training courses. Your relationship with us enables you to receive a 15% discount on the $2,000 class. Would you like me to schedule you for the next one?*

Customer: *I've had it with you people. You keep trying to sell me stuff I don't need while not resolving my issues. We need to meet with my manager. (cc: Decision Maker.)*

Here, a typical customer service scenario unfolds through a set of interactions that causes the relationship to unravel to the point where a "get your suit on meeting" is required between the customer (end-user and decision-maker) and the product provider. What a waste of time and energy. Not to mention customer dissatisfaction.

First, email can be an effective communications tool, but it has its limitations. In our example, the most important suggestion would be that the Customer Service Representative should have picked up the phone and called the customer after receiving that first email. Something is just not right. Continuing this dialog in email not only served to elongate resolution (reply/response times) but caused each party to lose context (train of thought) which further exasperated the situation.

You might ask: "Why wouldn't I continue the dialog in email, the customer started it that way?" To which, I respond with "are you a professional or an amateur?" The customer needs your help. They have gone (seemingly) multiple days with a faulty product and it is YOUR responsibility to get them "back in business." It requires you to further diagnose the situation, which simply is not as effective in email. So, take charge and pick up the phone.

As a Customer Service Manager or Supervisor, you may have assigned certain CSRs to email duty today. The CSRs are using email to respond to/process as many inquiries as they can to make their numbers. They may think that picking up the phone is not part of email duty and/or it will make them miss their numbers. Managers / supervisors - you are encouraged to clarify this (including a balanced set of metrics) to avoid a situation similar to our example.

Second, when discussing matters with customers, don't talk about policy (quality check) - they don't care. In the above example, the device doesn't work. All the customer cares about is a working product (or service).

Third, asking a long-time customer if he is using the product correctly adds insult to injury. Instead, walk-through the customer's use of the product (step by step) to identify clearly what is going on, and when.

Finally, while up-selling and cross-selling are certainly important goals for Customer Service organizations, WAIT until you have fully diagnosed a (problem) situation and exhausted every possible alternative to solve the customer's issue.

Getting into the hearts and minds of your customers requires moving beyond help scripts and policy – it means truly understanding what matters to them and helping them achieve their goals.

## *The Written Word*

With so much of our daily communication occurring through written form, through email, instant messaging, etc., it is important to make sure they are clear and productive.  We will now examine approaches to ensure individual interactions that occur in written form are effective and support, rather than detract from, the overall customer relationship. While we provide useful advice for all written communications, special emphasis is placed on email. Email is a wonderful tool, but how often have we hit the send button only to wish seconds later that we could retract the message, either to delete or revise prior to sending. What follows are practical strategies to consider as you craft that next message.

The key points we will cover include:

- Ensure your communication stands alone
- Consider the audience
- Read it "as if" you were the recipient
- Acknowledge the "bigger picture"
- Special handling procedures when emotionally charged

### **Ensuring Your Communication Stands Alone**

The first step in preparing your written communication is to recognize that it must "stand alone." This is important for two reasons:

1. There is no telling who may read your note beyond the intended recipient(s).
2. People are busy and have likely lost context with regards to prior communications on the topic.

As such, it is critically important to ensure that complete context of the topic is provided. You can do this by providing an opening statement or paragraph (depending on complexity) that summarizes the topic, what has been previously discussed and/or agreed to, and the purpose of this specific communication.

Just as important is to provide a closing statement or paragraph with regards to next steps or your expectations with regards to the recipient's response (action to be taken, confirmation of receipt, etc.). Finally, depending on the nature and criticality of the situation, you will want to indicate something to the effect of "if I don't hear back from you within [the appropriate number of hours or days] I will follow-up with you."

### **Consider the Audience**

Think about the phrase "one size does not fit all" when drafting your communication. For instance, are you addressing your customer's management level, engineer or administrative contact? Following are brief strategies for addressing each:

 

- Management - Ensure you relate the topic to the business challenge or opportunity, value expected or delivered, performance, goals, objectives and the "numbers." Be focused, get to the point and be as brief as possible. If you are requesting buy-in or a decision, clarify the options, business (not technical) benefits, drawbacks, your recommendation and why.
- Engineer (including IT or technical individuals) - In addition to sharing the above information (as appropriate), you will want to provide relevant technical details to "bolster" your communication in support of continued dialog in which you may be seeking to collaborate on a solution or obtain buy-in or advice.
- Administrative (including customer's front line/technical contacts) - Answer the recipient's (unasked) question: "What does this mean to me / my job?" Additionally, sharing how you arrived at decisions, conclusions and/or recommendations is helpful to maintain buy-in and overall support of the relationship. If you are asking someone to do something new or different, it is important to share details of the "how to." In fact, you are encouraged to offer the recipient the option of contacting you via phone to help with a walk-through of the process.

The above advice is very high-level and some communications may need to target an audience made up of multiple profiles. The main point is to consider the unique perspective(s) of your audience and address the needs of each recipient. Finally, while you may be the expert on your business or products, customers do not enjoy being told what to do or communicated to in a way that makes them feel inferior.

## Read It "As If" You Were the Recipient

Prior to sending your communication, you are encouraged to read it "as if" you were the recipient. This can be as simple as "rebooting" your brain and putting on the hat of your recipient. Alternatively, it may be appropriate for you to walk away from the computer or work on something else for a few moments. Upon your return you will want to review the communication ensuring no assumptions were made with regards to the recipient's level of understanding of the topic and overall context that it is being presented in. And, ask yourself: "If I were the recipient, do I get it and how would I feel about this?"

As you know, "it is not only what you say, but how you say it." You will be surprised at how often you'll look back at your written communications through the lens of the recipient only to discover that your intent wasn't effectively communicated and/or the message does not stand alone as the information was shared "out of context." This can lead to a simple misunderstanding resulting in time wasted or the complete unraveling of a relationship.

## Acknowledge the "Bigger Picture"

During any communication with the customer, especially in written form, consider the reality that it is part of a bigger (relationship) picture. You might ask yourself the following questions:

- How does this communication relate to, impact (positively or negatively), support and/or evolve the relationship?
- Do I have an opportunity to demonstrate or deliver value beyond the "immediate" need or expectation?

 

For example, your customer may have asked you a question. You are preparing a brief and concise response. You have probably heard the proverb "Give a man a fish and he eats for a day. Teach a man to fish and he eats for a lifetime." You are about to give the customer a fish. Is there a way, instead, that you can teach customers to fish, so that they might answer similar questions for themselves in the future? If so, spend the extra few minutes to do so. You will have exceeded their expectations by making them smarter and more self-sufficient AND you will save your company time and money in the future.

No communication is an isolated incident. It ALL relates. And, each is an opportunity to reinforce or detract from the relationship. Ensure that you acknowledge that this "bigger picture" exists.

### Special Handling Procedures When Emotionally Charged

Have you ever drafted a letter or email while emotionally charged, sent it, and very shortly thereafter wished you could retract it? Have you even laid awake at night thinking about the impact it may have? If you are honest with yourself, you have probably done this. Following are 4 simple steps you can take to ensure that your communications are not clouded by emotion which may impact your (otherwise) good judgment, common courtesy and professionalism.

- Write it
- Walk away
- Let it sit (24 hours, if possible)
- Revise and send, or...delete it and forget about it...

In this discussion, we have tried to share practical (if not simple) strategies to ensure that your written communications effectively support the overall customer relationship. Consider them well, or expect to spend (waste) time clarifying prior communications, recovering from errors resulting from miscommunications and mending broken relationships.

## *Time is Money – and Your Reputation*

You have heard the phrase "time is money." While certainly true, how you manage your time is also key to your reputation with your peers, boss, subordinates, and more importantly, your customer.

There is another proverb: "don't put off until tomorrow, what you can do today." Because we are all under significant time constraints, we must acknowledge the corollary to this proverb, which is: "push off until tomorrow, what is not important today."

I like to say that ANYTHING is possible with enough time and money. The problem is, we are limited in both. So, how do you ensure that you accomplish the important activities (in your business and personal life)? It is ALL a matter of priority.

The key elements of time management involve the following:

- Create a list
- Prioritize the list
- Do the list
- Handle the incoming

- Repeat the process...forever

**Create a List**

The first and most basic step of time management is to make sure that you capture EVERY task you need to do and commitment that you make to others. I tell people that if you don't see me write it down, then it is not going to get done. Period.

Instead of overworking your brain by trying to remember everything you commit to (e.g. returning that call, sending that email), write it down. If you don't, be prepared for the embarrassment of saying "I spaced it", "sorry I didn't call you", "it slipped my mind", etc. These are not the comments of someone that you'd want to give your hard earned money to. So, why should you expect someone to want to do business with you if this is your modus operandi?

**Prioritize the List**

At the end of each day, review your notes and consolidate all action-items and "to dos" onto a single list. Review the list and set a priority for each item as follows:

- Those items that ABSOLUTELY MUST be done the following day.
- Items that are important but not critical to complete tomorrow.
- Would be nice to get done, but can easily be pushed off until…
- Items that you can and should delegate to someone else.
- Items that can be eliminated.

Recognize that not every task carries the same level of importance, and each has a committed and/or expected timeframe. Consider all of these factors when setting priority and you'll find that there will only be a handful of items (6 to 8) that ABSOLUTELY MUST be done the following day. The rest can wait.

**Do Your List**

Now that you've established priorities, you can begin the next day by working on those items flagged as priority A. Don't touch the B's or C's, even if they are easy or more enjoyable. Being able to crank out several B's and C's can provide immediate gratification. But, guess what? At the end of the day you will look back at your list and find incomplete priority A items staring you in the face. Another day of ineffective time management.

As you complete a task, take the final step of crossing it off your list. The feeling of accomplishment is extremely rewarding as you recognize that you've filtered through the noise of the day and completed an important task that you committed to perform for, or deliver to, someone else. Great job!

**Handle the Incoming**

Now reality hits. You have begun your new practice of working on your priority A items and you receive an urgent phone-call, email or visit from a co-worker requesting your immediate attention. Here is the moment of truth. Do you drop everything and completely engage to address this "incoming" item? Maybe. But, maybe not...Remember, whenever you say "yes" to someone or something, you are, at the same time, saying "no" to a prior commitment (to someone or yourself).

To be sure, you will need to assess the importance of the item that has just entered your radar screen. However, it doesn't mean you immediately must engage and respond. Instead, it may simply mean that you carefully understand the request and add it to your list as a priority B or C item (something you can address tomorrow or later).

Too often we mistake the urgent for the important. To be an effective manager of your time, you need to qualify (however briefly) each demand for your time and consciously decide where it fits in your priority scheme for the day.

Want to be perceived as an exceptional performer? Do what you said you would do and don't get caught up in "stream of consciousness" by bouncing from activity to activity based upon what is in your face at the moment.

What we have covered here are the basics that will get you jump started on the path of being an effective manager of your time. If you are like me, you need more, in which case I recommend the most effective book on time management that I have ever read: *The 7 Habits of Highly Effective People* by Stephen R. Covey.

If you want to be known as someone who can be counted on and is a high performer, in the eyes of your customer and your peers, you must be an EXCELLENT manager of your time. This means that you must be on time, every time, for calls, meetings, appointments and completing your tasks and activities as committed. Anything less is not serving your customer.

## *Navigating the Organization*

While the objective of any service team is "first touch" resolution for as many inquiries as possible, some number of inquiries (escalated or otherwise) will require the engagement of other resources within and even outside of your own firm.

Navigating the organization to respond to and resolve customer inquiries involves the following:

- Doing your part
- Using your interpersonal management skills
- Dealing with non-responsive people
- Knowing who to go to before you get the ball

### Doing Your Part

The first step to ensure you get the support you need from the rest of the organization is to set the example. Are you easily accessible to others when they are in need of your support? And, when you are away (briefly, or for an extended period such as vacation) do you let people know how to get the support they need?

There are two basic steps you can take here:

1. Set up your standard voice-mail greeting with a message indicating an alternate contact number (your cell) and/or a person whom others can contact in the event of an emergency or when you are not immediately available.
2. When you are going to be away for an extended period of time, indicate so in your voice-mail greeting, and set up an email auto-responder with full details of an alternative contact. In both cases, you will want to make sure that you

 

have "cleared" the coverage with your alternate contact to make sure he/she will be available during your absence.

## Using Your Interpersonal Management Skills

When you have been "lit up" by a customer due to a particularly troublesome issue that requires support from others in your organization, your interpersonal communications must be kept in check. Remember that it is not only what you say but how you say it. People are busy, so being respectful of this fact when requesting their support will go a long way to obtain their buy-in to respond to the customer situation.

Dale Carnegie said it best: "you can get more with a teaspoon of honey than a gallon of gall." In fact, if you haven't read the book How to Win Friends and Influence People by Dale Carnegie I suggest you do so.

## Dealing with Non-Responsive People

If, or should I say when, your attempts to engage someone results in a non-response, there are 3 steps to consider:

1. Remain focused on the client, who is the reason why you are both employed at your company.
2. Explain to the person you are attempting to engage what's in it for him/her. For example, resolving the customer's situation may support your firm's customer satisfaction or revenue goals, for which you are both "bonused." The situation could provide an opportunity for two cross-functional organizations to demonstrate effective collaboration and bridge building. Finally, if you still meet with a lack of response or willingness to help then...
3. Go up the food chain. The person you are relying on likely has a specific set of skills or subject-matter-expertise. Not being available might not be his/her problem, nor is it yours, or the customer's, problem. But, it is the problem of the supervisor or manager of the organization whose resource you are attempting to engage. So, you can take the next step of contacting the "next level" in the management chain and indicate something to the effect of "We have [this customer situation] that needs the attention of someone with Chris's skills. However, it appears that Chris is extremely busy and unable to get involved. Who would you suggest that I work with from your team on this?" The supervisor can then make the decision to reprioritize Chris's work list or allocate an alternate resource to engage.

Too frequently people are afraid to take this step because they feel that they will damage relationships. But, considering the approach outlined above, have you actually "told on" Chris? No, not really. You have actually acknowledged that Chris is a very knowledgeable and valuable employee who is extremely busy.

## Knowing Who to Go to Before You Get the Ball

When coaching baseball, we tell the players that they need to know what to do with the ball if it is hit to them, before the pitch is thrown. The same applies in business.

If your business has achieved any measure of success, you have realized that you can no longer deliver highly effective and responsive customer service by simply leveraging long-held personal relationships. In fact, you may no longer know everyone else in the company, or at least who is in the office and when. As such, there needs to be a formalized "who-to-call-list" that provides key contact information for each functional area that is directly involved in impacting the customer experience. To be clear, this is NOT a corporate directory or phone list.

The "who-to-call-list" is a matrix that contains the primary point of contact, backup, manager, director and VP of each functional area along with 24x7 contact information for each. While the primary points of contact and backups may rotate from time to time, the manager, director and VPs will remain static unless there are organizational changes.

## *Project Management Basics*

I often say that "if you have something important to accomplish that has more than 5 moving parts, you need a project plan." This is crucial not only for internal (back-office) projects but more-so for those projects that directly impact your external / paying customer. Effective project management is key to ensuring holistic delivery on the commitments your firm has made to the customer, and is an important skill to performing as a highly effective customer advocate.

The basics of project management include:

- Define the boundaries, resources and stakeholders
- Divide and conquer
- Obtain commitments and caveats
- Document and publish the plan
- Conduct periodic status meetings
- Check-in on critical tasks
- Communicate progress

### Define the Boundaries, Resources and Stakeholders

The first step to driving a project involves clearly identifying the following:

- Scope and Objectives - The goal(s) of the project and anticipated outcome(s). In defining scope and objectives, it is also effective to identify what the project is NOT intended to accomplish.
- Stakeholders - The project sponsors, business owner(s), participants, subject matter experts, customers and champions at all levels (executives to individual contributors).
- Risks and Assumptions - Those factors which may derail the project and potential undesirable outcomes if the project is not managed effectively. Additionally, you will want to identify all assumptions that you are making and/or basing your approach on.

After capturing this information in a project overview document, you will want to review this material with those involved in the project to ensure everyone is on the same page. By doing so, you will continue to hone the above and establish an increasingly clearer vision for the project team.

## Divide and Conquer

Once you know the boundaries, resources and stakeholders of the project, it is important to break down the discrete tasks and activities necessary to complete the project and establish ownership of each.

I am often engaged on projects that have been underway for several weeks or months, to get things back on track. Frequently, numerous people have been engaged, each working hard on project activities, but dates and milestones have continuously slipped. Once I complete the above steps (defining the boundaries), it often becomes clear that there are multiple "phases of value" that can be delivered to the [project] customer. Dividing the project into these phases of value increases the project team's focus and enables the team to achieve success in bite-sized chunks, thus boosting confidence levels of the project team and the [project] customer.

## Obtain Commitments and Caveats

Once you know the project tasks and activities, you need to obtain commitment from task owners as to when each will be completed. This is where the rubber meets the road. Do you simply take the task owner's commitment at face value (I'll get this task done by 12/6)? Often you'll hear a task owner indicate something to the effect of; "I'll get it done, God willing and the creek don't rise." As the project manager, you need to determine the reasons why the creek will rise. While the task owner may have subject matter expertise in areas that you (the project manager) do not, you need to use your critical thinking skills to obtain an appropriate level of understanding to base your project plan on. You might ask questions such as: "What are the prerequisites to you completing this task? Do you have any vacation planned between now and then? What are the risks that might impact your ability to complete this task by the date you mentioned?"

If you find that the timeframe to complete a critical path task seems unreasonable, you will then want to do a deep dive to learn more about the nature of the task and approach being taken to complete it. You may find that they are trying to build a Mercedes when all you need is a Pontiac to get the job done. You certainly want quality, but there is a business (cost/benefit) trade-off that you, the project manager, need to facilitate.

## Document and Publish the Plan

Once you know the project boundaries, resources, stakeholders, tasks and activities, it is time for you to prepare the official plan. Do this (quickly) through 2-3 iterations that are reviewed by members of the team, before announcing project commitments to the organization. The objective is to ensure that all members of the team are aligned and prepared to deliver on key milestones. Once this has been established, publishing the plan beyond the project team will serve to create cross-functional/organizational awareness and alignment.

## Conduct Periodic Status Meetings

To ensure the project remains on track, you will want to establish and conduct periodic team meetings/conference calls. While the frequency depends on a number of factors (project complexity, duration, proximity to completion of critical milestones and status), these are typically conducted on a weekly basis. The objective is to ensure ongoing coordination and integration of project activities of ALL participants. Effective meeting management is crucial as every member of your team is busy, not only with fulfilling their commitments to this particular project, but likely with other duties as well. As such, you are encouraged to focus time on facilitating discussions related to any issues that may have arisen and a review of critical path items (discussed below).

However, will you (the project manager) wait for the weekly project meeting to obtain the status of critical tasks and activities? You already know the answer to this...

**Check-in on Critical Tasks**

While projects often involve dozens, if not hundreds, of tasks, there are typically only a handful of critical path items - those items that by completing late will have a direct impact on the project timeline. These are the tasks that you will want to perform status checks on between project status meetings to ensure that they remain on track. If (or should I say when) a critical path item is off track, you need to engage immediately to determine what you can do to remediate challenges or remove obstacles.

A principle to live by here is: if you don't check on the status of project tasks, you can safely assume that they aren't getting done!"

**Communicate Progress**

There are (at least) two key audiences that you need to communicate project status to, each with an appropriate level of detail.

1. The immediate and extended project team. These are the individuals within the inner-circle of your project team, where detail-level status reporting is appropriate. This can include both internal (to your organization) and external (customers and/or 3rd party service providers) resources.
2. Project sponsors and/or stakeholders. These are typically higher-level individuals that only require top-level project status information communicated via an executive-level project status report. In most cases, this can and should be communicated in a one-page overview.

Regardless of the audience, a key element to reporting on project status is the "color-code." The color-code provides a quick read-out on overall project status to any audience. Project status color-codes are as follows:

- Green - The project is on track to achieve milestones. There may be issues but they are surmountable.
- Yellow - A risk or obstacle exists which has taken, or has a high potential to take, the project off track from achieving milestones.
- Red - The project is presently off track and will likely not meet milestones. Remedial action is required to get things back on track or milestones may need to be reset.

Consider the discussion on project management above to be "the basics." I firmly believe that an effective project manager can lead the efforts to build anything from a bicycle to a rocket ship. That is, project management is a core competency in and of itself. Leading a team of subject-matter-experts by systematically organizing efforts and effectively managing risks, assumptions and expectations through continuous communications ensures the successful achievement of important goals and objectives.

## Conclusion

Customer Advocacy is essentially about getting the relationship between your organization and your customer back on track. The relationship can go awry due to an exception in the performance of your product or support process, miss-set expectations, or even simple misunderstandings in the communication between the parties. The Customer Advocate function is designed to cut through the "noise" and determine the real issue, get it resolved, and get the customer back under the company's standard operating procedures. Sometimes this requires "tough love," which may be equally applied to the customer and internal groups.

In order to be effective, the Customer Advocate must possess a number of key skills and abilities. These include honesty, strong interpersonal management and communications, good business judgment, executive presence, and solid time management skills. Most importantly, however, the Customer Advocate must be a skilled project manager – able to lay out a project plan -- taking into account input on tasks and risks from all involved – and manage these tasks and risks to fruition.

Structure is another key element to any Customer Advocacy function. In our discussion, we offered a framework that provided this structure to ensure that everyone knew who all the "players" were, what the "play book" looked like, and who to go to if they got the "ball" (a customer situation). Understanding who the customers are, the process for engaging a Customer Advocate and escalating issues, and formalizing the response, communications, and management review processes helps to keep everyone on the same page, while getting the customer back on track.

Ultimately, the Customer Advocate can help the organization form a long-lasting, profitable relationship with the customer, while helping the organization learn from the experience and find ways of avoiding the situation – and the associated pain – in the future.

## About Customer Centricity, Inc.

Customer Centricity, Inc., is a business consulting firm that works with companies to align their resources to exceed customer expectations in the most efficient and effective manner possible. We leverage our real-world experience to help our clients continuously improve their service delivery and management capabilities to:

- Increase profitability
- Improve customer satisfaction and retention
- Increase operational efficiencies
- Improve employee satisfaction

Customer Centricity optimizes the interaction between people, process and technology in several ways:

- Comprehensive assessment methodology to identify the actions that will yield our clients the greatest return
- Skills Training to enable customer-facing personnel to deliver exceptional levels of customer service
- Design and Implementation of business processes to serve the customer and manage corporate resources in efficient, effective and consistent manners
- Identification of the appropriate business processes to automate, enabling companies to get the most from their investments in technology

Customer Centricity's approach is to work closely with our clients to help them understand what they are doing right, and their opportunities for improvement. We provide pragmatic recommendations that provide immediate benefits, and we drive continuous improvement programs to help our clients realize significant return on investment in a very short period of time (measured in weeks, not months or years).

Visit our web site at www.customercentricity.biz for access to an archive of our newsletters and other resources to help you transform your company into a customer centric organization.

 