Customer satisfaction – a partnering approach

Customer satisfaction; the Holy Grail of all organizations. But how does one go about it? Is it by sheer technological superiority or is it by cost advantage or is it by good servicing or is it by … ?? In reality, there is no single factor that results in a satisfied customer. In a typical organization, different people play a role in satisfying a customer. Take an IT organization, you have Business development managers, consultants, Project Managers (PM), senior management and other personnel from the organization that play a role in the IT initiative and interact with the customer. With so many people interacting with the customer on different planes, how can one ensure customer satisfaction and who is responsible for this?

Only an Information Technology (IT) solution provider will realize the amount of efforts, pains and stress involved in executing a software development project successfully. Today's software and solutions are becoming increasingly complex; in terms of the diversity and heterogeneous nature of technologies used, the environment in which they need to be deployed and the Quality of Service (QoS) criteria that they need to achieve and maintain. The need for the solution provider to get a total feel for the customer's expectations, concerns, business and problems has never been as crucial as it is in today's world. Technical excellence alone is not sufficient to carry a project to a successful end - the definition of successful here, being a satisfied customer. The solution provider needs to be an integral part of the customer's world and domain to understand his needs better. Customer Relationship Management is one of the critical business areas for the corporate world today. As we enter a new millennium, the relationship between the customer and the solution provider is undergoing a transformation from a typical consumer-supplier model to more of a partnership model.
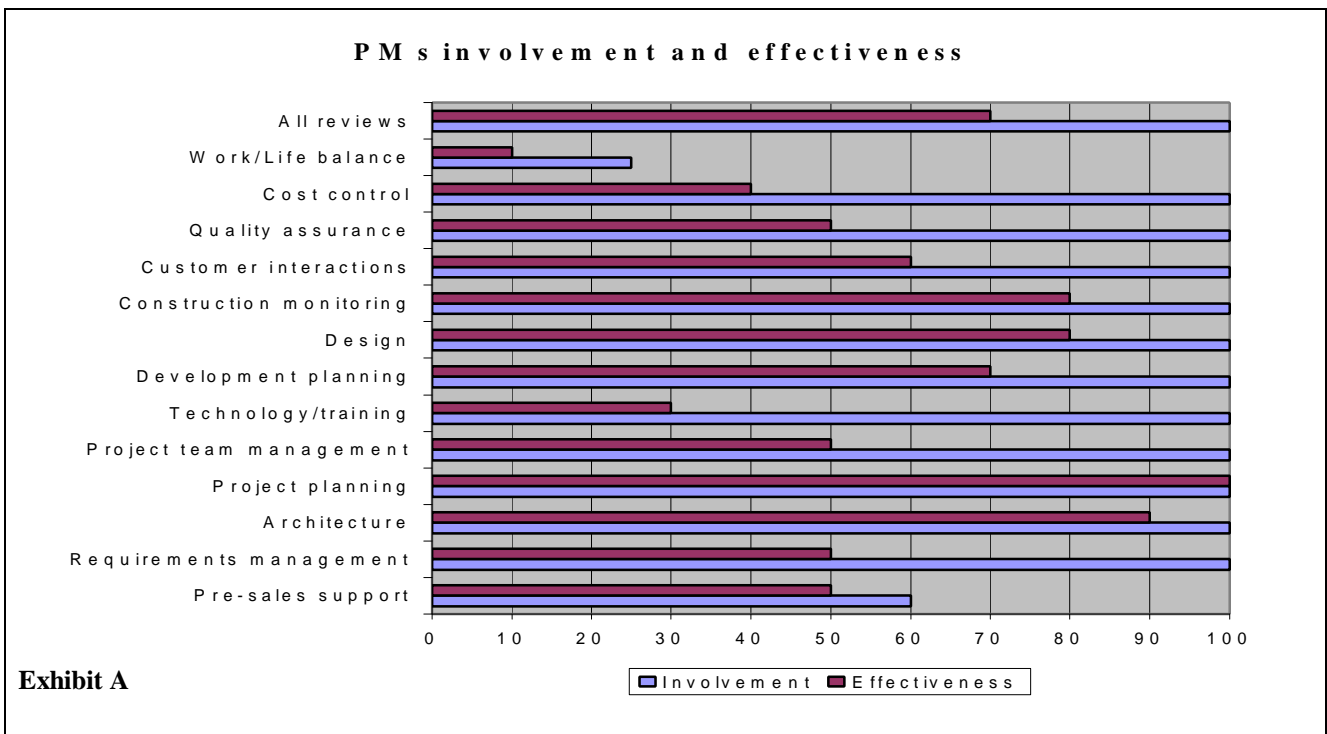
Current picture

For quite a few years and more recently, executing a software development project has become a complex exercise involving multiple entities like technologies, methodologies, people and environments with multi dimensional relationships. Add to this the globalization of business and international projects done from **offshore facilities situated across several locations**. Requirement Management and Project Management are the most crucial processes in completing projects successfully with Customer satisfaction in mind. Customer handling on a continuous basis so as to ensure a sense of partnership from the customer's side, is an essential factor.

The Project Manager (PM) has been the most harassed man especially if he has to handle more than one project for different customers. He gets pressurized from multiple directions – customer, project team demands for time, marketing guys and the company management and at the same time, he has to extract support from the same entities, which puts him in one end of a one to many and many to one relationship. His position is an unenviable one and not all of them come out unscathed.

Until now the PM has been totally responsible for balancing and managing all the critical factors and entities and achieving the desired results. Even though his focus has been heavy on technical issues, he has had to get involved simultaneously in contract management, requirement management, cost control, quality assurance, resource management and pre-sales support. With projects having to be delivered "yesterday" it has been impossible for the PM to effectively focus on the most important responsibility of project management, viz. to deliver projects to the customer's satisfaction. The PM has basically been doing crisis management most of the time, rather than project management. Because of the distributed focus on too many issues and entities, the quality and timeliness of delivery have been lost. The PM has been used as a 'Jack of all phases of a project' instead of being the master of his role.

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The graph below gives an idea about how effectively the project manger's time is typically spent.

PMs involvement and effectiveness

Category	Involvement	Effectiveness
All reviews	100	70
Work/Life balance	25	10
Cost control	100	40
Quality assurance	100	50
Customer interactions	100	60
Construction monitoring	100	80
Design	100	80
Development planning	100	70
Technology/training	100	30
Project team management	100	50
Project planning	100	100
Architecture	100	90
Requirements management	100	50
Pre-sales support	60	50

Exhibit A

It is very clear from the graph that the involvement and effectiveness do not match expectations resulting in **delayed projects-increased costs, Quality assurance not guaranteed and adherence to standards not ensured and most importantly Customer care takes a beating.**

Some organizations have tried to add a new role – Program Manager; to assure customer care, but in most cases the Program Managers have turned out to be managers of Project Managers resulting in additional load and stress on him in terms of reporting and meetings. The Program manager generally has been more a manager's manager or monitor rather than being able to provide hands on support in some critical phases of the project. Just support in planning or in commercial aspects will not be of much help. It has to be a techno-commercial support.

A new approach

At Fusion, we have successfully developed and implemented a practice to facilitate effective customer care and satisfaction. The practice revolves around the concept of 'Account management', where the customer is the 'account' being managed. The designation of 'Account Manager' (AM) is very much a part of the organization structure of the company and is typically assigned to one of the senior managers. The Account Manager has two roles to play; one with the Project Manager and the development team, and the second with the customer. Acting as the bridge between the two, the Account Manager facilitates co-ordination between both parties by following a set of well-defined processes. The Account Management function involves diverse skills and approaches requiring technical, managerial and other soft skills. This function adopts a strategy of logically dividing the activities in a project between the AM and the PM so as to ensure the delivery of the project to the customer's satisfaction.

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Account Management

An account can be defined as the grouping of one or more projects for a given customer. An Account Manager has two faces; one with the various people from his/her own organization such as the PM and the development team, and the second with the customer. Acting as the bridge between the two, the AM facilitates co-ordination between the various entities involved by following a set of well-defined tasks and processes. The AM function involves diverse capabilities requiring technical, managerial, communication and other soft-skills. The AM acts as a friend, philosopher and guide to the project team and to the customer.

Account Manager and Project Manager - One might say that the PM is responsible and should ensure that the customer gets what he wants. However, most often, PMs are focused on delivering the project and are caught up with the day-to-day tasks of the project. They sometimes do not have the **big picture** in mind. True, they have to understand the customer's requirements before they start the project. But, this understanding is primarily focused towards being able to come up with a suitable technical solution and design. The PMs' aim is to see that the requirements are met within the agreed-to timeframe and costs and with the required quality. In short, the PMs' focus becomes more project-centric rather than customer-centric. While, this focus is essential to deliver a successful project, it does not necessarily mean that the customer will be satisfied. One has to really listen to the customer and understand his needs on a different plane.

Unlike the PM, the AM focuses more on the customer, his business and his overall needs. The AM sees things more from the customers perspective and is able to appreciate the customers needs from a business angle and thus is able to ensure that the customer gets what he wants; not so much so from the project deliverables and code point of view, but more from what the customer really needs over and above this. The AM basically caters to the needs of the customer, ensuring that he is a part of the entire development process and sees to it that he is serviced in all aspects; and not just from the technical or project aspect. Also, while doing this, he adds value to the project by providing technical and managerial support to the project team wherever needed. His knowledge of the customer's requirements and the solution defined by the team will be equal to that of the PM.

The PM's role begins when the project is awarded while the AM's begins even before that – from the point of developing the prospect/concept into a customer project. Once the AM comes into the picture, he becomes the person responsible for the customer in all respects. The customer is 'adopted' by the AM. The AM needs to build a rapport with the customer and at the same time he needs to forge a strong relationship with the PM and the team. Roles and responsibilities are clearly defined and understood so that neither the PM nor the AM step on each others toes.

The AM understands the customer's business drivers, plans and goals and talks to him to help him realize these. He builds a bridge that facilitates future business. The AM ensures quality since he acts as the customer's man at the development site and he verifies the conformance to requirements of the delivery. To a large degree, this ensures that the delivery is accepted by the customer with minimal problems. On the other hand the AM acts as a facilitator for the project team by taking care that the customer does not pressurize the project team into over committing deliveries.

The 'Account Manager' at Fusion is defined as a person with substantial experience in development of projects in diverse application areas and environments and he should have the following essential skills – good inter-personal relationships, good communication, should be able to provide hands on support in specific areas like requirements management, quality assurance and testing, should have the ability to understand new domain areas easily and should have been involved in international projects. In addition, he should be conversant with current and emerging technologies.

The following graph depicts the involvement and effectiveness of the PM and the AM. Compare this with the earlier graph (Exhibit A) to appreciate the difference.
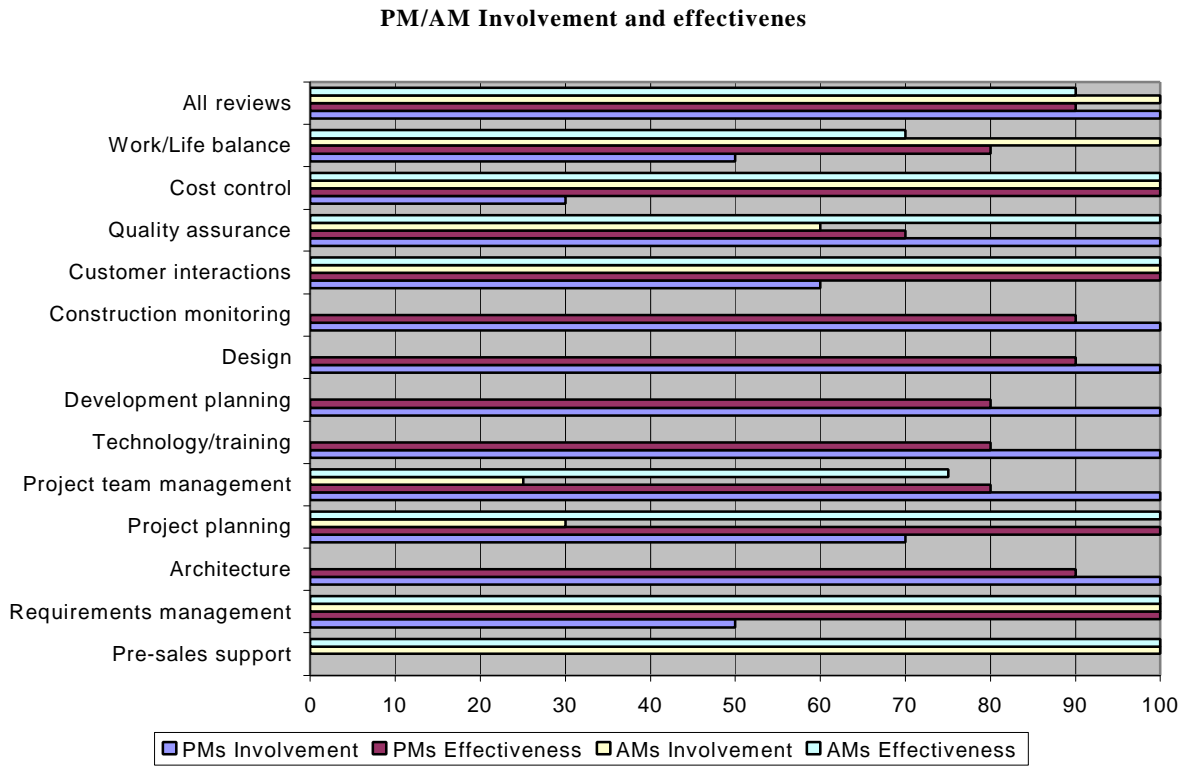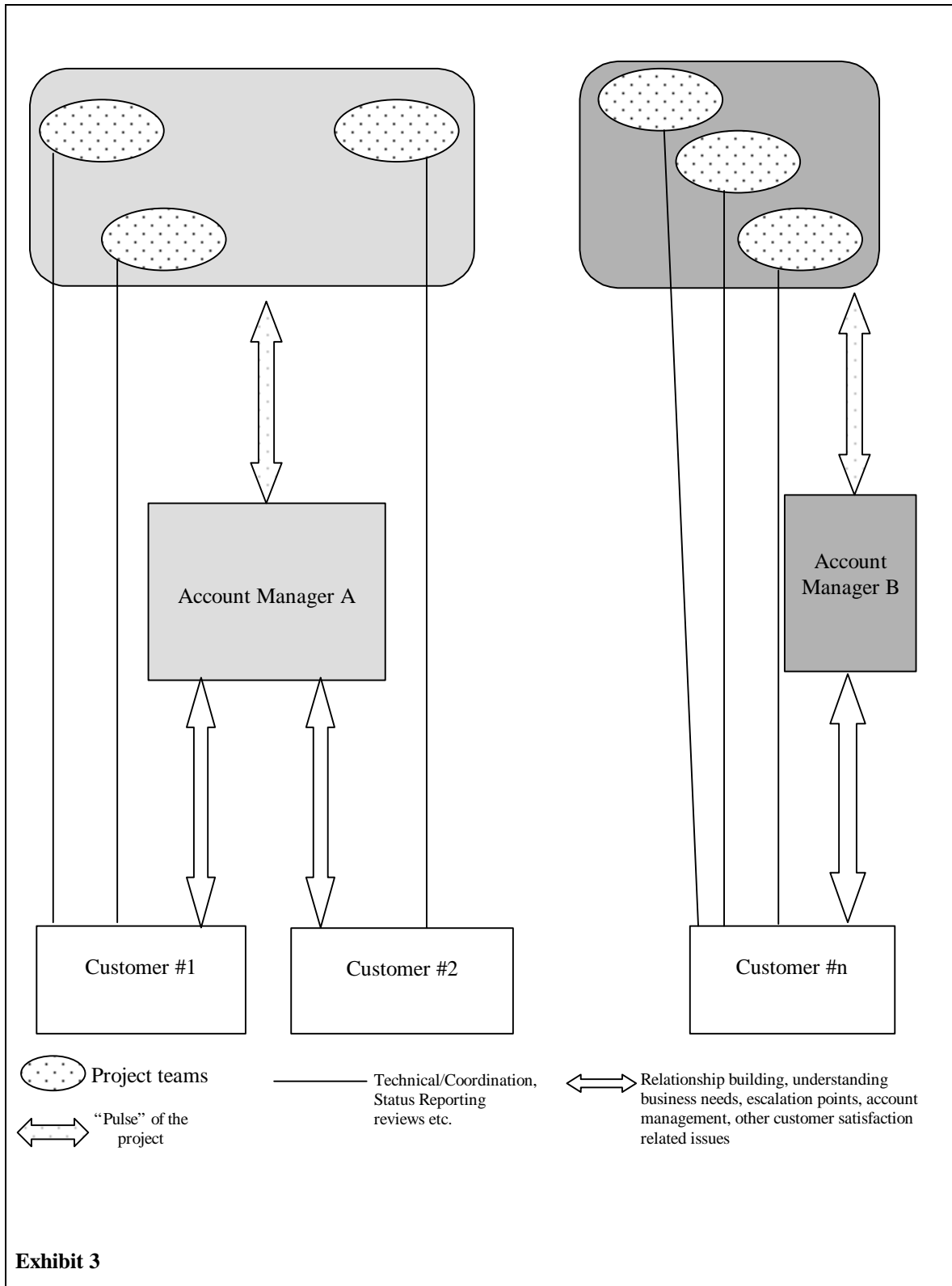
PM/AM Involvement and effectivenes

Exhibit B

The relationship between customers, Account Managers and project teams can be depicted as below:

Exhibit 3

Responsibilities of the Account Manager

Phase 0 – Requirements	Phase 1 – Analysis, S/W specs.	Phase 2 – Architecture, Design	Phase 3 – Development	Phase 4 – Deployment, Delivery	Phase 5 – Support	Phase 6 – Closure
Drive initial proposal to contract closure. Act as the communication conduit between customer representatives and organization

Understand customer's business environment, needs and future plans.

Take ownership for financial aspects of the project.

Coordinate customer visits, when required.

Validate software requirements for system solution and from customers business perspective

Set and validate process for negotiating and changing S/W requirements

Monitor project cost on an ongoing basis to ensure that cost control parameters are not violated

Follow the billing process as per terms. | Ensure that analysis satisfies customers business needs

Resolve issues and specify contingency plans.

Determine inter dependencies and leverage opportunities with the help of the project team.

Validate project plan

Ensure that all resources required for phases 2 and 3 are identified and committed

Validate SRS and ensure review by other technical peers.

Inter group coordination.

Monitor project cost on an ongoing basis to ensure that cost control parameters are not violated.

Follow the billing process as per terms. | Continuous interaction with customer to keep up with any changes in his business environment

Finalize deliverables and formats.

Validate phase deliverables.

Monitor project cost on an ongoing basis to ensure that cost control parameters are not violated.

Follow the billing process as per terms. | Procure equipment as per needs of the project

Responsible for providing infrastructural needs of the development team

Monitor SQA

Continuous interaction with customer to ensure that the solution and the development satisfies his business environment | Ensure shipment release is on time

Own the responsibility of customer sign-off

Communicate potential deployment delays to the customer

Identify and discuss future business initiatives with the customer | Identify support team and initiate support planning

Ensure support to customer as per contractual terms | Ensure that customer assets are returned as appropriate

Finalize and trigger closure plans

Ensure that billing is finalized and account is closed

Archive all project related communication as appropriate

Analyze project costs to ensure that cost control parameters have not been violated.

Initiate dialog for future business. |

Advantages of the AM function

No.	Business Objectives	Quality Goals
1.	On time Delivery	Put systems in place to achieve estimation accuracy. Ensure Management Commitment, Better requirements management, Planning and Tracking
2.	Assurance on meeting requirements - Defect Free from Customer's Perspective	Better Requirements Management. Ensure Traceability of Requirements to stages of the project Lifecycle.
3.	Increased Efficiency/Reuse and Leverage	Reuse knowledge, Develop organization- level capability, leverage processes and training resources. Develop high quality software components allowing for reuse in developing software/solutions.
4.	Reduced Cycle Time	Put business processes under control, study them and explore mechanisms for reducing cycle time.
5.	Job Satisfaction/Work-Life Balance	Clarify job roles, promote teamwork and coordination, facilitate resource allocation, control commitment process
6.	Cost control	The AM shields the PM from this. The AM is Constantly aware of the proposal to the customer.
7.	External dependency management	Assesses the risk and draws up contingency plans to manage these dependencies.
8.	Resource management	Ensure on time availability of skill and other resources either from internal or external sources.
9.	Increased Quality Assurance	AM can ensure conformance to quality standards and maintenance of quality records
10.	Reduced involvement of senior management	This arrangement takes care of the customer and the organizational interests almost totally, thereby freeing the senior management for other higher level activities.
11.	Business development	Increased goodwill from customer/s resulting in repeat orders and good references.

Recent experiences

Two recent projects that we undertook have benefited substantially from this concept. The characteristics of these projects included aggressive schedules, new technology, scarcity of skilled resources, complex domains and evolving requirements. With the introduction of the AM function in these projects, we were able to successfully execute them within the contracted terms with a better work/life balance for the project teams. Some of the significant contributions by the respective AMs were: Requirements management, Resource management, QA and testing, Domain understanding, project planning and delivery/deployment/launch logistics.

Here is what **Project Managers at Fusion** feel about the AMs role in their projects:

" The Account Managers have been extremely helpful in the areas of Requirements management, Resource assessment, Resource management, Project planning, testing and quality assurance and most importantly in client handling. This has allowed us to concentrate our focus on quality and timeliness of deliverables "
The **senior management** at Fusion says -

"The introduction of the Account Management role in the organisation has visibly enhanced the technical focus of our project managers and has rendered client handling more effective thereby reducing the load of marketing and management resources. We have been able to deliver projects on-time and get more repeat orders."