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April 18, 2005
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Engaging the Hidden Customer

How often have you been well down the development path only to suddenly find it derailed by a new requirement? How often did that requirement come from someone you didn't even know was a stakeholder? Changing requirements, either due to scope creep or incomplete project definitions, is one of the leading causes of late and over budget programs. As a capital equipment project manager, one of the most challenging tasks is gathering and synthesizing the project requirements. That task is made significantly more difficult when the relevant stakeholders aren't included in the beginning. Although there are other facets to this problem, I will address two that affect almost every program. One is identifying all of the customers and, two, is getting them to pay attention to your project.

Identifying all of the customers is probably the easier of the two. There are almost always more customers for a program than it would initially appear. There is the end customer who we might have the opportunity to talk to, but is more likely represented by sales and marketing. There are the supporting groups, which include manufacturing, service, applications and documentation. Sometimes finance and commodities may even be involved. Finally, you can always count on the fact that executive management will have a stake in the program.

It may be useful to answer the following questions to help uncover additional customers:

- Who else is interested in the outcome of this project and is not already on the project team?
- Who else will be working on this project, both in the factory and in the field?

Walking through internal processes of development and product launch is an effective way to discover who the players are. For example, when will financial approval of the project be required? When will Purchasing and Supply Line Management become involved? Walking through the project approval steps can bring these customers to light. Other engineering departments may be overlooked until you discuss how the program interfaces will be handled and if there are other potential applications for the design. Testing and Applications Engineering are other customers that may appear when you walk through what happens as the product is introduced. Sometimes we deliberately avoid certain customers for fear they may have different expectations of the program. Although it involves a little extra work, it's better to be aware of everyone's expectations up front as it is almost always possible to negotiate them later. Surprises late in the program cause far more time and money.

Typically, the project manager's job is to identify the specific person responsible in each functional group. This is often easier said than done, which leads to the second part of the problem. Getting the customers to pay attention can be difficult, especially in the multi-tasking, multi-project environment of most companies. It's a mistake to assume that once a person is



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assigned to your project, they will begin working on it immediately. It's also a mistake to assume that they know the type of support your project needs. The instances when people are dedicated to just one project at a time are few and far between. Supporting your program is probably just one more added responsibility for many of the stakeholders.

The first step in gaining their attention should be educating them on the value of getting an early start on the project. Provide tangible examples of how early planning will save them significant time and energy later on and how it results in a much better product. A common example is the software interface. If protocol requirements are clearly stated up front, compatible software and hardware can be incorporated, avoiding a costly rewrite of the software down the road.

Sometimes it is not a lack of desire, but simply a lack of time or personnel. It's tempting for the development team to press on and ignore requirements when there is no representation. The project is then delayed as missing elements are revealed piecemeal and then required to be implemented. Successful project managers can fill in these gaps by drawing on their own experience. By previously developing good working relationships with these groups and taking the time to understand their needs, these project managers can bridge the gap until a qualified representative is available. You can get a lot of latitude from the supporting groups if they feel you understand their issues and that you have made a sincere effort to accommodate their needs. A good project manager can also leverage the customer's time by identifying the parts of the program that specifically impact them. Distilling the issues allows critical questions to be asked in such a way that the customer can answer them without a great deal of effort.

Finding all the customers and gaining their active participation is a key step to achieving overall customer satisfaction. Taking the time to seek out the hidden customers up front will minimize surprises for everyone. Seeking creative ways to include them in the process with relevant questions and process reviews while leveraging their time are effective ways to gain their active participation.

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