

from the Board



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Meeting Customer Expectations

PMI Today: Why is the customer experience so essential in the development of new products?

Ms. La Tona: We live in an era where companies like Uber, Apple, Google and Amazon shape our ever-increasing expectations for immediacy, seamlessness, convenience and personalized customer experience. Today more than ever, the customer experience dictates whether a product will succeed or fail. With today's "always on" communications via social media, everyone will hear about the customer experience immediately. Therefore, designing for that remarkable customer experience cannot be underestimated.

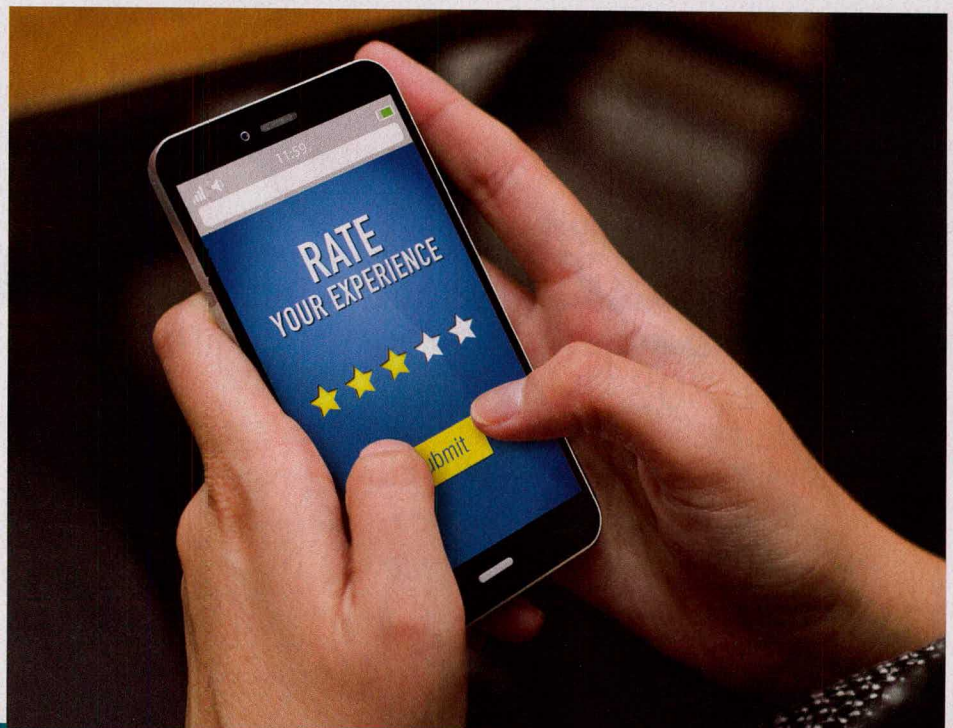
Done right, that customer experience also earns a prized commodity, customer loyalty. Done wrong, with today's technology, customers wield an amazing amount of influence and can

swing perceptions with just one bad experience.

Mr. Maxsen: The time when organizations invested a lot of resources

to create products and just push them to customers, thinking they would line up to have them, is long gone. Not knowing and taking into consideration

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the value that customers demand from a product or service—and how they actually perceive that value—can leave the possibility of success to chance. The same goes in the nonprofit and government world. In this case, it can be even more difficult because the ultimate “customers” are the beneficiaries, who are usually not present while products and services are being designed and created.

PMI Today: Can integrating the customer experience into all phases of a project reduce errors and omissions discovered at the end?

Ms. La Tona: Planning for the customer experience starts at the beginning of the project and continues throughout, testing the hypotheses, the promises and the customer experience the project is intended to fulfill. An example of this was when we were chartered to develop a new materials receiving system for automotive parts manufacturers. Spending time with the customers on the dock, seeing how they did their work and personally understanding their pain points and needs allowed us to understand both their articulated and unarticulated needs, allowing us to create a customer experience

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that truly surprised them. Continuing to interact with them throughout the process enabled questions to be asked and answered—rather than assumptions being made.

Projects that only interact with customers at the beginning and at the end suffer from a view that everything can be understood, taken away and be brought back, as a perfect package. Rarely is that the case.

Mr. Maxsen: Customer experience is about fully understanding all the perceptions that your customers (or whoever you serve) have while interacting with the organization, be those perceptions conscious or subconscious, during the complete customer life cycle. This means that integrating the customer experience is essential to obtain their expectations and needs and to understand where

they feel that they are not getting the value they want or should. Interactions such as a call to a support center to make a complaint or make suggestions provide invaluable information to design fit-for-purpose solutions and to solve current issues. Project teams need to embed all possible sources of information (past complaints especially) as early as possible so that whatever is designed, developed or improved has a much higher chance of meeting expectations.

PMI Today: What benefits do customer centricity have on individual employees in terms of how they approach their work?

Ms. La Tona: If employees develop empathy for the customer, understand customer motivations and behaviors, they can better relate to the customer and create better outcomes.

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Employees who are customer-centric gain fulfillment from delighting their customers.

Aligning the organization around customer centricity and expected outcomes for the customer can be very powerful. Greater levels of innovation can be achieved when employees have a deeper understanding of the customer. I remember the projects where the team felt vested in the customer and their outcomes were the most impactful and far-reaching. The sense of team and pride was overwhelming.

Mr. Maxsen: Having a clear, well-communicated and well-understood value proposition is the first step to being able to meet customer needs, and understanding that information allows individuals to make sound decisions and adequately address risks and issues because they comprehend the implications of their actions on objectives. Customer centricity requires constant capacity building and communication and should never be underestimated.

PMI Today: How do project teams know who their customer is, their likes and dislikes and what challenges they face?

Ms. La Tona: Through various modes, including past projects, internal research, customer service calls, social media, internet, etc., project teams can amass vast amounts of data about customers. Turning that data into information, insight that discerns their pain points, challenges and expectations is the key.

Mr. Maxsen: Project teams must find ways to understand their customers and collect information that reflect needs and expectations as accurately as possible. This can be done through market surveys, feedback forms, customer/beneficiary participation in

brainstorming sessions, community engagement, use of trial products and services in selected areas, etc. Teams have several opportunities to use this information, like when documenting project requirements, developing quality assurance processes, performing quality control or validating with the customer to see if the product or service is fit for the designed purpose.

PMI Today: How do project teams stay in contact with customers throughout the project life cycle to capture perspective and feedback about any changes in wants and needs?

Ms. La Tona: Customer engagement should be planned into every phase of the project. If done properly, this planning will actually transform the customer experience. It cannot be an afterthought and it requires effort. Specific expected outcomes of customer engagement should be outlined in each phase. Whether it's designing experiences, testing hypotheses, validating assumptions or prototyping, this involvement and the feedback gained feeds and adjusts the next steps.

Customer interactions have to be planned into the project with the recognition that you'll find out something you didn't know and therefore use it to create a greater customer experience as a result. Planned customer engagement has sped up the process by providing insights, clarity and priorities along the way. Developing customer profiles that help you understand and measure your customers' behaviors at every touch point across multiple channels and having them guide decision making is another way of ensuring customer centricity throughout the project life cycle.

Mr. Maxsen: Engaging with customers is key to making sure the final delivery will meet expectations, and it is quite normal that expectations and needs change during the project life cycle, as the environment we live in is rather dynamic, with constraints frequently changing. Project teams need to plan their communication approaches considering these interaction points and collect feedback whenever possible, be that in a direct or indirect manner, and also be flexible enough to adapt to these changes. Project teams need to apply contextualized methodologies that allow for planned adaptability, quick reaction to changing needs and that also provide adequate governance to ensure accountability for results. Stakeholders are more and more willing to participate and co-create, rather than having solutions just being made on their behalf.

PMI Today: How do project teams capture customer feedback (such as satisfaction with the product or ideas for future product enhancements) after the project closes?

Ms. La Tona: Technology today enables a greater reach and ability to gather feedback. Initial reactions are important to gauge whether immediate expectations are met, or better yet, exceeded. Once the customer has interacted with the product for a period of time, the degree to which the product integrates with your customer's lifestyle can be better understood. That's when you'll likely get valuable information around additional features or functions. Capturing this information for future project teams and product evaluations is important.

Mr. Maxsen: Infrastructure projects usually have something called a defects notification period, which determines when the project can be finished. During this period, which is after the final

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product has been delivered, customer feedback is extremely important because the final product or service is actually operational. This practice can be applied to all types of projects from different sectors and industries. Intelligent organizations can use this opportunity to continue to gather lessons learned and further interact with those who are using the products and services, later embedding those lessons into planning sessions of other projects.

PMI Today: How can the project manager lead the way in bringing in a culture of customer centricity?

Ms. La Tona: Customer centricity is really about deeply understanding your customers' needs and fulfilling them better than anyone else. The project manager must develop within the team clear empathy for the customer, helping the project team truly see through the customer's lens, and that will further the team's ability to create a greater customer experience. Guiding the team through planned engagement with the customer, reinforcing the culture through orientation, questions and reviews, setting objectives and expectations are all ways the project manager can lead in this culture.

Co-locating with the customer is another approach I've used in the past to fully immerse the project team, providing the team with greater appreciation and perspectives. Get creative about how to instill a customer-centric culture. It will pay dividends as a result.

Mr. Maxsen: Culture does not change overnight, but can rather be progressively molded as a result of actions and attitudes the organization continually demonstrates. Having awareness of the importance of focusing on delivering value is very important. Project managers should find opportunities to allow the customers (or beneficiaries) to effectively participate in the requirements process and in every other relevant opportunity, as well as make available communication channels that allow customers to easily provide feedback. By repeatedly fostering a favorable environment where decisions are made based on customer needs, and to the extent possible allowing customers to co-create those solutions, project managers help bring in a culture of customer centricity.

PMI Today: In its strategy refresh, how is PMI becoming more customer centric?

Ms. La Tona: Strategy is one of the most important domains for the Board, ensuring PMI continues to be relevant well into the future. As we look at how PMI should transform, ensuring we have clarity on who the customer is and how we will service that customer provides the necessary focus for the organization.

Our focus is on the individual as the primary customer. This customer centricity enables us to specifically target the individual as they go through their career, not on a transactional basis but as a journey.

Looking through that individual's lens, based on where they are in their career and what their needs and expectations are provides us with a focus as to how to best service them.

We are currently in the process of segmenting our target customer base, transforming that data into insights and quantifying the value which will shape our products and services moving forward. Our winning aspiration will also provide focus as we further articulate our ambitions as an organization. This is an exciting time to be part of PMI as we shape our future and continue to be the greatest influence on the profession.

Mr. Maxsen: The focus of our attention now is to critically ask ourselves who we should primarily serve and how we can better engage to understand what these target stakeholders want and need from the Institute. We have conducted research on the future of the profession and other market aspects, and are factoring in lessons learned from current and past initiatives. Chapters are being heard, our regional offices are providing contextualized information, organizations of several industries and governmental institutions are being consulted, and we are also reaching out to our members in order to better understand their needs and expectations. Due to PMI's size and the global impact of everything we do, this process requires an iterative approach, and we are expecting to have it completed in the next few months.

Find more details and perspectives on customer centricity in an article in February 2017 *PM Network*® (pages 38–43).

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