

# Customer Interaction Patterns

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## Abstract

With the increasing emphasis on business awareness, team members are asked to play a more active role in interfacing with customers. This new role poses a challenge for those who may need guidance to improve their effectiveness in customer interaction. These patterns target developers in their direct interaction with customers. This collection has acquired a structure that could produce a pattern language.

## Introduction

Most of the Customer Interaction Patterns were mined from a presentation by David Saar, Senior Product Planning Manager at AG Communication Systems. Although many developers in our company have customer interaction experience, this was the first time a product development team had been formally prepared for their first interaction with the customer, in this case, GTE.

After the presentation, I remembered a guideline from Jim McCarthy's book [McCarthy95] that seemed to capture the intent of David's message. I converted the guideline to the pattern, *It's a Relationship, Not a Sale*.

Linda Leonard, Product Development leader at AG Communication Systems, contributed the ideas for *Be Responsive* and *Show Personal Integrity*, which contain some important, down-to-earth suggestions for improving customer interaction. The idea for *Know the Customer* came from Rod Veach, our on-site customer representative from GTE.

As patterns were added to this collection, a structure began to emerge. It has been a challenging task to mine these patterns from experts in customer interaction and apply what I am learning about pattern languages to coax a fledgling language from a "pile o' patterns" -- to quote Kent Beck's observation at a PLoP '96 workshop session. The struggle to clearly define the relationships among the patterns was fully as difficult as writing the patterns themselves but just as rewarding. I continue to improve each pattern and also the language.

These patterns have many known uses. Usually David would say "Life!" when I asked him for a specific known use. Obviously, these patterns can be applied in any human interaction!

Pattern names are in italics and part of the narrative, following patterns by Gerard Meszaros and Jim Doble [Meszaros+98].

An early version of the patterns was workshopped at PLoP '97. After several internal workshops and updates, a later version was workshopped at PLoP '98. The patterns are now mature enough that I teach a class based on the patterns at AG Communication Systems.

Pattern	Intent
<a href="#"><u><i>It's a Relationship, Not a Sale</i></u></a>	This pattern is the foundation for all the customer interaction patterns. Develop a relationship with the customer. Focus on this relationship, not the current transaction. Use: <i>Know the Customer</i> and <i>Build Trust</i> .
<a href="#"><u><i>Know the Customer</i></u></a>	Learn as much as possible about the customer. Use: <i>Listen, Listen, Listen; Be Responsive</i> and <i>Customer Meetings: Go Early, Stay Late</i> .
<a href="#"><u><i>Build Trust</i></u></a>	Every contact with the customer is a chance to build trust. Take advantage of it. Use: <i>Listen, Listen, Listen; Be Responsive</i> and <i>Customer Meetings: Go Early, Stay Late</i> .
<a href="#"><u><i>Listen, Listen, Listen</i></u></a>	Listen to the customer with intent to understand. Use: <i>Show Personal Integrity; Be Aware of Boundaries; Take Your Licks;</i> and <i>Mind Your Manners</i> .
<a href="#"><u><i>Be Responsive</i></u></a>	When you receive a request from the customer let the customer know you received it and how you plan to resolve it. If you can't get final resolution as promised, contact the customer, and say what you have done so far.
<a href="#"><u><i>Customer Meetings: Go Early, Stay Late</i></u></a>	Arrive at customer meetings early enough to meet other attendees and spend time socializing. After the meeting, allow a little time to talk to others with common business interests.
<a href="#"><u><i>Show Personal Integrity</i></u></a>	Don't withhold important information from the customer but <i>Be Aware of Boundaries</i> .
<a href="#"><u><i>Take Your Licks</i></u></a>	Don't argue. Try to understand how the customer's business is impacted. Don't try to appease the customer by making promises you can't keep. Use: <i>Be Aware of Boundaries</i> .
<a href="#"><u><i>Be Aware of Boundaries</i></u></a>	Treat every conversation with the customer as part of a negotiation. Don't discuss commercial considerations, e.g., price, cost, schedule, and content that aren't part of your responsibilities. Use: <i>Mind Your Manners</i> .
<a href="#"><u><i>Mind Your Manners</i></u></a>	Be polite. Dress appropriately to meet customer expectations. Show respect for everyone, including competitors. Be especially careful in interactions with others from our company in front of the customer.

Table 1. Customer Interaction Patterns

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## Pattern Name: *It's a Relationship, Not a Sale*

### Problem

How should you treat customers so they'll be satisfied with our products?

### Context

You are a product developer. You may be part of a team or a single contributor. You currently play an active role in interfacing with customers or you have been asked to take on this role.

Bruce Whitenack's *Customer Rapport* (develop a rapport with the customer) [Whitenack95] and Jim Coplien's *Engage Customers* (closely couple the customer role to the Developer) [Coplien95] define the context for this pattern.

### Forces

- Developers usually have a product focus not a customer focus.
- We want to delight our customers.
- We want to protect our own interests.

### Solution

Develop a relationship with the customer. Focus on this relationship, not the current transaction.

*Know the Customer* and then use that understanding in your product as part of an on-going commitment to *Build Trust* with the customer.

### Resulting Context

Customers will feel they're buying into a relationship, not just buying a product. Your customers will feel like staying with you. Your customers will sense that you are going somewhere together.

A long-term relationship means repeat business. It's much cheaper to keep a customer than to find a new one.

Having a good relationship with a customer is not enough to ensure financial success. Innovative solutions will capture markets regardless of customer relationships. The solutions in these patterns are only part of an overall business plan that includes attractive, innovative products.

The customer can become too dependent on you. As a result of your relationship with the customer, you will be the one the customer turns to. You will be the one who gets all those late night phone calls, those last minute requests for urgent fixes.

## Rationale

In his presentation, David Saar emphasized the importance of developing a relationship with the customer. On many projects, developers need a customer contact to answer questions that arise during development, and usually, team members simply want to be handed a name and a phone number. David explained that just having a person to call is not enough, that a relationship with the customer would give the results developers wanted.

The relationship with the customer is like a dance. You take steps, and the customer takes steps in response, and then you take more steps. You must be focused on the flow of transactions, on the overall pattern and direction, not merely on the current product. Human relationships are fragile and not formed instantly but develop slowly and evolve over time.

The following is from *Selling with Honor* [Kohn97].

In business as in life, it takes a long time to make friends.

The following is from Dan Behymer, director of quality systems at a manufacturing facility in Cincinnati. It appeared in a letter to the editor of *Quality Digest*, May 1997.

The quality-satisfaction gap is not about products. It is about feeling. In a culture where you are bombarded every day with advertisements, objectives and incentives, where someone is always after your hard-earned money, you just want to know that if you buy their goods, they will care once the sale is over. We want someone who cares and will take action. Caring can't come from a total quality improvement team, reengineering, just-in-time or any formula, objectives, or consultants. Customers are human; companies are collections of humans.

## Known Uses

The following is from an AGCS postmortem:

Our customer knows that this is a new product. They've been great about taking releases that are not perfect and working with us to get the product where it should be. We need this customer feedback in the iterative development approach we're taking.

The following is from another AGCS postmortem:

The customer pulled us into the SOA market. We didn't know much about NP and the customer was also learning. We followed the customer and just let them lead us.

The following is from Nick Ash, senior telecommunications analyst for Caterpillar, in an interview for *Inside AGCS* [Inside98].

Now that [ROAMEO is] up and running, [AGCS] is monitoring the system and alerting me if things don't look right. ...This wasn't a matter of installing the system, leaving, and now we're on our own. I feel like I have the support of AGCS on an ongoing basis.

I think you have a very good product and you should be proud of your company and the

service employees provide. I'm impressed with AGCS as a company.

## **Author**

Jim McCarthy, adapted by Linda Rising from Guideline #17, "It's a relationship, not a sale" [McCarthy95].

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## **Pattern Name: *Know the Customer***

### **Aliases**

*Know the Customer's World, Live with the Customer, Shadowing*

### **Problem**

What's the best way to establish a relationship with the customer?

### **Context**

You deal with customers who use your products in their products or services. You understand *It's a Relationship, Not a Sale*.

### **Forces**

- Organizations are dynamic; we are changing; our customer is changing.
- Customers have different interaction styles.
- Developers usually feel that knowing the product is enough.
- We want results quickly, so do our customers.

### **Solution**

Learn as much as possible about the customer.

Help the customer and the customer's customers succeed. This means learning the "inside" of the customer's business and the "far side," (the users and vendors whose products must work with yours). Understand the needs and drives of all customers along the customer chain, from intermediate providers to ultimate users.

Think about the customer's needs instead of your own and the business will take care of itself. Understand how your customers make money and help them make more and your income will take care of itself. Helping your customer succeed is a sure way to success.

There is no substitute for an on-site visit. See the customer's world and the problems they face.

One trip is worth hours of brain storming about the customers' needs.

Get "hands on" experience in the customer environment. Some customers will allow you to visit their site and take notes while people use your product. Customers can also provide documentation for their business processes.

Provide customer support at an appropriate level. A vice-president feels more comfortable talking to someone at a higher level, while engineers want someone who knows low-level details.

If the customer does not speak your language (technical, lingual), learn at least some of the customer's language.

When you're attending a customer meeting, don't just spend time with friends. It's easier to socialize with people you know, but make an effort to meet and greet the customer.

Use: *Listen, Listen, Listen, Be Responsive*, and *Customer Meetings: Go Early, Stay Late*.

## Resulting Context

When we understand the customer's world, our products become more useful. Understanding the world of our customers' customers helps ensure that products integrate properly for the customer.

When we understand our customers' values, we become an extension of their enterprise.

Understanding the customer enables a better understanding of customer priorities. This can be valuable if a trade-off between schedule and functionality must be made.

Applying this solution is not as easy as it may sound. Company culture and politics may be beyond your understanding.

This is an on-going task; our environment and that of our customer continually change. Our organization and the customers' organizations are "many-headed beasts" and present different views to different people at different times.

## Rationale

Knowing your customer's products and services and how the customer gets these products and services to market helps you understand how the customer thinks from a business point of view.

As described by John Guaspari [Guaspari98]:

It's not enough to ask customers, "How are **we** doing?" We have to ask, "How are **you** doing?" We need to understand what our customer's wants and needs are. If we really understand these things we'll be able to apply our expertise to meet the needs they express and some things they may not even know they need.

The following is from an article by Rob Thomsett [Thomsett97].

The question "What are your requirements?" is the wrong question. The right question is

"What is your world?" Once we have begun to understand our customers' organization, their concerns, and their way of working, we can begin to get a clearer idea of them, and it becomes much easier to understand their requirements.

To understand their needs, we must understand their culture, their hopes, and their expectations. Doing this requires you to get to know your customers as people first and customers second. Understand your customers and you'll understand their expectations.

## Known Uses

This pattern can be applied in many human relationships. Members of the ARC (Administrative Resource Center) at AGCS were quick to point out that Tom Snelten, Product Development leader, was a good coach because he was able to see the world from the ARC viewpoint.

The following is from an AGCS team postmortem:

Once you get to know the customers, they would ask you about anything, including other products!

The following is from another AGCS team postmortem:

If you know someone, they'll do anything for you. You can call them in the middle of the night. If you don't have a relationship like that, you have to follow an official path and it takes longer.

Members of the ARC have said:

There are some people you can kid with and some you can't. You have to learn how to deal with people as individuals.

The following is from ARC member Doris Freeman:

Suppose someone brings me something to scan in. Usually they just say, "Please scan this." I try to learn more by saying, "You want me to scan this so you can put it on the web? or send it in an e-mail? or edit it?" They will then say what they have in mind and I can help determine exactly what the end result should be. Sometimes the requester hasn't thought ahead and going through this exercise saves time for both of us! It's good to ask questions. Find out what the customer *really* wants.

The following story is from Carole Boese, Fe Pati, and Ellen Lara, about the Adopt-A-Printer Process instituted by the ARC:

The following customer satisfaction issue was noted in the 1995 ARC Customer Survey: Service of printers in Building 1, 2nd Floor, was #1 in negative rating and #6 in importance to those customers.

Members of the ARC followed up and learned that no department was responsible for the daily maintenance of printers. As a result, the ARC formed a sub-team to implement a solution to customer printer/toner concerns. Header sheets were also collected and recycled as pads of scratch paper. There were no concerns from customers in the 1996

survey. In fact, a great improvement in this service was realized.

## **Author**

Rod Veach, as told to Linda Rising.

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## **Pattern Name: *Build Trust***

### **Alias**

*Build Relationships*

### **Problem**

How can you strengthen a relationship with a customer?

### **Context**

You understand *It's a Relationship, Not a Sale* and are trying to *Know the Customer*.

### **Forces**

- We need to interface with the customer.
- Customers need contacts in our organization they feel comfortable with.
- People are reluctant to spend time with people they don't know.

### **Solution**

Every contact with the customer is a chance to build trust. Take advantage of it.

You can't simply build relationships by phone or e-mail, no matter how sophisticated the information highway becomes. There will still be a need to do a "face-to-face." People trust people they see regularly.

The following is from *If I Knew Then What I Know Now* [Edler95]:

Not calling is not caring. Staying in touch with customers means everything. Customers need to see and hear from their suppliers. They need to know how much you care. Remember to listen first. These contacts invariably lead to priceless new information.

All things being equal people will do business with people they like. All things not being equal, they still will!

Use: *Listen, Listen, Listen*, *Be Responsive*, and *Customer Meetings: Go Early, Stay Late*.



## Resulting Context

As a trusting relationship is established, customer interaction becomes easier, questions are answered, problems are solved, and progress is made.

It's easier to build a relationship than to re-build a relationship. Don't assume that a relationship is static. It must be supported and maintained over time.

## Rationale

Stephen Covey has observed [Covey89]:

If I make deposits into an Emotional Bank Account with you through courtesy, kindness, honesty, and keeping my commitments to you, I build up a reserve. Your trust toward me becomes higher, and I can call upon that trust many times if I need to. I can even make mistakes and that trust level, that emotional reserve, will compensate for it. My communication may not be clear, but you'll get my meaning anyway. ...When the trust account is high, communication is easy, instant, and effective.

Every customer encounter is a valuable opportunity to add to your Emotional Bank Account.

According to Scott Hunter [Hunter98], clients prefer to do business with people they like, with people who seem genuinely interested in them, who deal with their concerns. The worst customer interaction mistake for some customers is to get right down to business at the first meeting with the customer, while others do not want to waste time on preliminaries. It's extremely important to *Know the Customer*. The most critical result produced during an initial meeting is to begin to build trust.

As Mike Reynolds, Vice-President of the AGCS Business and Market Development Group, has observed,

People buy products from people.

As David Saar has said,

Customers only trust those they know -- in person. That is what makes my travel so essential.

## Known Uses

The following is from an AGCS team postmortem:

We had problems with our demos but we were able to assure the customer that the product would work and spent time establishing a good relationship and building trust. We talked to the customer every day. This is especially important early on.

The following is from another AGCS team postmortem:

We continue to work closely with Rod Veach to maintain trust. We have very open

discussions about problems. What works well for us is to bounce it off Rod first to find out how GTE would react.

The following story is from Kathy Kromrie-Williams:

A customer at a remote site called up with a negative growth problem. They were getting an error message saying they hadn't deleted a device they had just deleted. I tried to reproduce the problem but everything worked fine here! We talked on the phone as I entered the commands. They swore up and down that they had followed the User's Guide. Something didn't seem right.

I knew Stan Ricksecker had a good relationship with the customer, so I asked him to help me. Minutes later, Stan told me they were afraid they would have to pay for a fix if they admitted that everything they had done wasn't as documented in the User's Guide. Once he found that out, it didn't take him long to find out they had used the wrong command. The fix was easy and provided without cost to the customer.

The relationship Stan had with the customer and their trust in him could not be replaced by my knowledge of growth processes or anything else. Once customers know you will work with them, together you can accomplish anything!

The following story is from Karen Grover:

Steve Holm had been working on ATIUM View for some time when he was transferred to the Wireless project. Steve had a good working relationship with a customer who was preparing to install a distance learning network. When Steve moved to Wireless, he informed the customer about the transfer but promised to see the work through until the network was turned up (4 months in the future). Steve attended meetings and fielded calls from the customer, but then passed the requests along to me and others -- the Facade pattern? The customer was happy because Steve's project move was transparent to them. It worked nicely for me, too, because Steve passed along a lot of information to help me with the requests so I didn't have to tackle the requests cold.

The following is from an AGCS postmortem:

Customers usually don't want too many contacts. They just want to interact with one person.

## **Author**

David Saar, as told to Linda Rising.

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## **Pattern Name: *Listen, Listen, Listen***

## **Problem**

What's the most effective way to develop the customer relationship?

## Context

You understand *It's a Relationship, Not a Sale*. You are trying to *Know the Customer* and working to *Build Trust*.

## Forces

- Too many customers demand your time.
- What people say may not be what they mean.
- Your attention may be divided across multiple tasks.
- It's hard to always give 100% -- fatigue, illness, personal problems, etc.

## Solution

Listen to the customer. Show genuine interest. Pay attention when they're talking; don't just use the time to prepare your response. Don't interrupt. Don't go off on tangents. Follow their agenda.

If we're too anxious to please, we may speak out of turn. Let the customers talk. Give them room.

It may not be until the tenth sentence when customers says what they really want. If you cut them off too early, you'll miss their meaning.

Pick up information. Learn what the customer is thinking. Hear what **isn't** said.

Sometimes you need to push for more information. Ask probing questions. Ask them to draw a picture!

Portray an agreeable, winning attitude. Be flexible and positive. Take action items. Work with the customer.

*Show Personal Integrity, Be Aware of Boundaries, Take Your Licks and Mind Your Manners.*

## Resulting Context

The customer will feel valued, that concerns are being heard and issues addressed. More than this, the customer's needs really will be heard since we are really listening.

Listening is only one part of building a trusting relationship with the customer. In isolation it will not work. It must be part of an overall customer interaction strategy.

## Rationale

What people say is often open to misinterpretation. Sometimes what they say isn't what they mean. Remember, this solution is applied in the context of *Know the Customer*.

As Stephen Covey has said [Covey89],

"Seek first to understand" involves a very deep shift in paradigm. We typically seek first to be understood. Most people do not listen with the intent to understand; they listen with the intent to reply. ... When I say empathic listening, I mean listening with intent to understand. I mean seeking first to understand, to really understand. ... Empathic listening gets inside another person's frame of reference. You look out through it, you see the world the way they see the world, you understand their paradigm, you understand how they feel.

From the New Revised Standard Version of the Bible, James 1:19:

...be quick to listen, slow to speak....

The following is from *If I Knew Then What I Know Now* [Edler95].

Listening is the most difficult skill to learn and the most important to have. Learning how to listen -- and really hear -- what people are saying can make all the difference. When you listen well you hear:

What customers say and what they really mean.

What your customers are really looking to achieve, including hidden agendas.

What your customers think is important.

Spend twice as much time listening as talking.

## **Known Uses**

The following story is from David Armstrong's *Managing by Storying Around* [Armstrong92].

A sales manager at Armstrong International wanted to add an obsolete feature to the division's new fish finder. This approach contradicted the company's strategy of always providing the latest and greatest technological advance. The sales manager wanted to add a simple flasher to a product that already provided information on the location and size of the fish. No one could understand why the simple indicator that a fish was nearby would be useful. The sales manager pointed out that many longtime customers were not comfortable with the new, computerized technology and wanted the simple interface they were used to.

The feature was added. Customer response was great and the product is still on the market. The moral of the story is listen, listen, listen.

The following is from *Selling with Honor* [Kohn97].

How can you find out what people really need? Ask lots of questions and listen more than you talk!

Black & Decker has a reputation for listening to consumers. In the 1970's, the company

discovered that consumers wanted a portable vacuum cleaner for small spills. This led to the hugely successful Dustbuster. In 1994, hearing that consumers wanted both hands free 75% of the time they use a flashlight, the company created the SnakeLight. How does Black & Decker stumble onto these innovative products? They ask lots of questions and listen for needs.

## **Author**

David Saar, as told to Linda Rising.

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## **Pattern Name: *Be Responsive***

### **Aliases**

*Don't Leave Your Customer Hanging, Keep Your Customer in the Picture*

### **Problem**

What's an acceptable response time for customer requests?

### **Context**

You understand *It's a Relationship, Not a Sale*. You are trying to *Know the Customer* and are working to *Build Trust* using *Listen, Listen, Listen*.

### **Forces**

- We want to be attentive to our customers.
- We can't always give an immediate response. We may be away from the office or the system may be down.

### **Solution**

Always return customer phone calls the same day, even if you know the customer will have already left the office and you will only be able to leave a voice mail. Somehow we don't feel bound by common etiquette when it comes to e-mail but a customer request via e-mail should always be acknowledged.

Never let the customer wait more than a week for a response on anything or more than a day for acknowledgement of the request. When you receive the request, contact the customer to say you received it and how you plan to resolve it. If you can't get final resolution in a week, contact the customer, and say what you have done so far.

Sometimes (as members of the ARC recommend), you must get back to customers immediately and try to complete requests in a day.

Ask customers, "What is your deadline?" to determine an appropriate response time.

Always have a message on your voice mail and autoreply on your e-mail if you are out of the office. This notifies internal as well as external customers if you're away and whom to contact in your stead.

Don't let your enthusiasm for a quick response lead you to overpromise. *Show Personal Integrity.*

## **Resulting Context**

Keeping customers informed of your progress on a request lets them know you are taking the request seriously, that action is being taken. Customers will feel you have their best interests at heart.

## **Rationale**

People don't like to be ignored, and that includes customers.

Nothing annoys customers more than thinking you're not being responsive. It doesn't help to be working hard on their behalf to resolve a problem if you don't let them know you're working on it.

## **Known Uses**

The following is from GTE Services in the annual quality survey:

My experience with working with AGCS has been outstanding. Their work/quality is excellent. They keep all necessary parties informed as to the status of all jobs. They are extremely easy to work/communicate with.

The following is from an AGCS postmortem:

Always remember to acknowledge voice mail or e-mail. Just say, "I got it!"

The following is from Marianne Davis:

Ameritech called and asked if AGCS would be interested in quoting price/delivery for TR11-88 requery. I got details on the project and within 2 days provided them with a quote.

Over the next week, I spent time getting to know the customer and telling them about AGCS. When I asked when they were going to make a decision, I was told they were leaning toward AGCS but had to wait for a reply from another company. They had given the other company the opportunity to bid this project 2 weeks prior to giving it to us. Overall, it took the other company about a month to get back to Ameritech with a quote.

Once we were awarded the business, it took about 2 weeks to get a signed contract. This was the start of a great relationship with Ameritech. To top things off, we delivered 30

days early with 0 defects. I agree with everything in these patterns. The main reason Ameritech went with us was because they felt comfortable with us every step of the way.

The following is from Kathy Kromrie-Williams:

A remote site was experiencing database problems that were interfering with providing certain services to the customer.

All attempts to recreate the problem using our interactive simulation tool or the prototype failed. We had an entire week's database changes shipped to us. Using the same load they had, I tried to recreate the problem by entering an entire week of the same commands. This took me several days, working day and night. During this time, the customer received no word from us.

Finally, the customer called and wanted to know what was going on. By this time, all the commands been entered and everything looked like it worked fine. We decided to do an audit of their patches and found several that were missing.

Our customers are very knowledgeable. I wish I had kept them more informed. We might have come up with the idea of the patch audit sooner. Certainly they would have felt more involved. It's too easy to be on one side of a problem and not benefit from expertise on the other side. Keeping the customer informed is only one of the many lessons I learned from this experience, but one of the most important.

## **Author**

Linda Leonard, as told to Linda Rising.

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## **Pattern Name: *Customer Meetings: Go Early, Stay Late***

### **Alias**

*Perfunctory (routine) Meetings, Schmooze!, Meet to Greet*

### **Problem**

You have to attend customer meetings and find them a chore. You're not getting anywhere building good customer relationships at these meetings. Often team members arrive just as the meeting starts and leave as the last slide is presented.

### **Context**

You understand *It's a Relationship, Not a Sale*. You are trying to *Know the Customer* and are working to *Build Trust*.

## **Forces**

- We want customers to be aware of the current status of the product.
- Some people feel that social interaction (especially meetings!) is lost productivity.
- Time management strategies discourage wasting time.

## **Solution**

Arrive at the meeting with enough time to meet other attendees and spend a little time renewing old relationships and forming new ones. After the meeting, allow a little time to talk to others with common business interests.

If we are holding the meeting we should plan for these pre- and post-meetings but keep it as short as possible.

## **Resulting Context**

When you show up a little early, you send a message to customers that you value their time. This also allows the meeting to start on time.

The extensions before and after the meeting more than justify the routine occurrence of the meeting itself, which becomes a shared experience instead of an obligation. A perfunctory or routine meeting becomes a more positive experience that helps build trust and solve real problems.

Don't lose your sense of the time constraints of the customer and your team members. We are all under time pressure, so a fine balance is required to convey the right message to our customers.

## **Rationale**

There are many meetings whose real purpose is to get concerned parties together. The announced purpose may be, for example, to hear status information, but the true benefit is the personal exchange that happens around the meetings.

Spending time socializing beforehand allows everyone to come to the meeting with a sense of camaraderie. As a result the meeting is more effective. That, in turn, makes the time after the meeting more worthwhile. Often a post-meeting gathering is where the real work is done.

This pattern has broader implications than customer interaction. As our company includes more and more telecommuters, there is the increasing loss of visibility to these employees. This can be harmful both to the worker and the company. The employee feels removed from team interaction and the company loses sight of the employee's contribution.

The following is from a Fast Company on-line newsletter [Imperato99]:

There is a legitimate social component to meetings. Sure, we'd all rather spend our time on "real work" than "idle chitchat." But you should never overlook the social side of



work rituals -- even in meetings that are "all business." In many of the meetings I run -- especially meetings that take place early in the day -- I schedule 5 or 10 minutes of open time, just to encourage people to relate to one another. If you plan for such time, if you put it on your agenda, then you won't feel as if you're not doing what you ought to be doing. Instead, you can enjoy going around the room and asking people what they did last night or over the weekend.

The following story is from Kathy Kromrie-Williams:

Our group had a "meeting rep" who volunteered to go to all possible meetings to represent the group and save valuable time for team members. It sounded like a great idea. The volunteer was well intentioned and was sincerely trying to save effort for the team.

The result, however, was a real loss of visibility by the team. No one else was part of interface meetings, so they had no input to agreements and misunderstood some requirements. The real impact was to the team's visibility to the rest of the project. Team members missed valuable networking opportunities and visibility to project management.

## **Author**

David Saar, as told to Linda Rising

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## **Pattern Name: *Show Personal Integrity***

### **Problem**

How much should you share with the customer?

### **Context**

You understand *It's a Relationship, Not a Sale*. You are trying to *Know the Customer* and working to *Build Trust* using *Listen, Listen, Listen*.

### **Forces**

- We can't tell customers every possible risk.
- Customers want to know everything.

### **Solution**

Part of an on-going relationship and good project management is to identify the top N risks. Share the impacts of all major risks with the customer. Be honest and straightforward in your communications and demand the same from people you deal with. Otherwise any relationship is doomed.

Honest communication means being open. Withholding important information is not honest. Customers who believe we don't lie about a situation still will not trust us if they believe we are not telling them the complete story. *Be Aware of Boundaries*.

Simply being honest is not the intent of this pattern. Some kinds of honest comments can be destructive. Remember the context of this pattern contains the patterns *It's a Relationship, Not a Sale*, *Know the Customer*, and *Build Trust*.

## Resulting Context

The customer will know that you can be relied upon to convey important information, even if it is not good news. The customer will learn to trust your word.

When you have a trusting relationship with customers and show personal integrity, the customers are calmer in the face of announced risks.

Once the risks have been shared, the customer will expect regular status reports. Don't just leave the customer hanging with a list of showstoppers and no updates.

## Rationale

Stephen Covey has noted [Covey89]

Integrity includes but goes beyond honesty. Honesty is telling the truth -- in other words, conforming our words to reality. Integrity is conforming reality to our words -- in other words, keeping promises and fulfilling expectations. Lack of integrity can undermine almost any other effort to...[*Build Trust*]. People can seek to understand, remember the little things, keep their promises, clarify and fulfill expectations and still fail to build reserves of trust if they are [two-faced].

The following quotes are from *Selling with Honor* [Kohn97].

Don't lie, don't deceive, and don't overpromise. Tell the truth. What you sacrifice in immediate profit will be more than made up in referrals and repeat business.

Don't hide even small defects. Always disclose something that would bother you, because it would also probably bother a potential...[customer]. And if they found out, they'd wonder what else you were hiding.

## Known Uses

The following is from an AGCS team postmortem:

When problems come up and we tell Rod Veach, "Don't worry about it!" He believes us. We would never hide anything from Rod. We let him know immediately about any problems.

## Author

Linda Leonard, as told to Linda Rising.

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## Pattern Name: *Take Your Licks*

### Problem

What's the best way to deal with an angry customer?

### Context

You're in a customer meeting or get a phone call or voice mail from a customer. From time to time customers may be disappointed with some aspect of the business relationship. This disappointment may come from unmet expectations, product performance or from simple misunderstandings. This disappointment is often manifest as anger. More often than not, this anger is directed toward any company representative that is at hand.

You understand *It's a Relationship, Not a Sale*. You're trying to *Know the Customer and Build Trust*.

### Forces

- No one likes to be yelled at.
- Our natural response is to be defensive.
- Being defensive is likely to escalate the customer's anger.
- Anger can damage the relationship with the customer.
- We want to diffuse the customer's anger.
- We want to protect our own interests.

### Solution

Don't argue. *Mind Your Manners*.

An irate customer is not a rational customer but, nonetheless, *Listen, Listen, Listen* and try to understand how the customer's business is impacted.

Do not try to appease the customer by making promises you cannot keep. *Be Aware of Boundaries*. Instead, ask questions; find out what the real concerns are. Take notes. Assure the customer that these concerns are a priority and follow up on them.

## Resulting Context

The customer will calm down sooner if verbal punches are not returned. When the customer has finished venting, the problem will still be there but the customer will feel better knowing that you understand the issues and will act on them.

Trying to solve the problem on the spot has pitfalls, too. Giving concessions easily may give the customer the impression that angry outbursts are the best way to do business with us. If you promise something you cannot deliver, the customer's expectations will again be unmet and trust will be broken.

## Rationale

As unpleasant as the situation may be, the customer may have good reasons for being dissatisfied. By remaining calm and allowing the customer to vent, the anger will diffuse.

Keeping your composure is especially important. You represent the company. Flying off the handle will not build trust.

## Author

Michael Duell

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## Pattern Name: *Be Aware of Boundaries*

### Alias

*Stay Within the Lines*

### Problem

Developers, especially engineers, love to solve problems and answer questions. It's difficult when in a problem-solving mode to step back and realize the impact of proposing a solution or giving an answer.

### Context

You are interacting with a customer and may be in a position where it's easy to become engrossed in issues and/or problems. You understand *It's a Relationship Not a Sale*. You are trying to *Know the Customer* and working to *Build Trust* using *Listen, Listen, Listen*.

### Forces

- We want to delight our customers.

- Customers may have unrealistic expectations and demands.
- We don't want to make promises we can't keep.

## Solution

Boundaries are different for different team members. Some can give information and make commitments. Each team member should know his or her role and be aware of the boundaries that are appropriate for the setting, the customer, and the point in the project.

Don't discuss commercial considerations, e.g., price, cost, schedule, and content that aren't part of your responsibilities.

Treat every conversation with the customer as part of a negotiation. Don't give away data or make instant judgments. Don't say, "Oh, that's easy!" or "That's impossible!"

Take note of any questions outside your area and get back with answers. Own the action items until you find the appropriate person to take responsibility for getting back to the customer.

*Mind Your Manners.*

## Resulting Context

The customer will feel that concerns are being heard and issues addressed but no commitments are made that might later have to be broken. More than this, the customer's real concerns will be heard but the company's, as well as the customer's interests will be protected.

It is not the intent of this pattern to allow a team member to cover up mistakes or avoid talking about risks; remember to *Show Personal Integrity*.

## Rationale

There can be wide impacts from simple discussions that can result in broken promises or incorrect information. Especially during early discussions, your goal is to understand what the customer really wants. It's easy to get carried away in customer interaction especially when trying to *Build Trust* and using *Listen, Listen, Listen*.

Boundaries are good for people. They set limits on actions and make it easier to act.

We must be aware that everyone represents the company and can impact current, future, and even past customer interaction. Off-hand remarks can have a lasting impact on the customer and current and future negotiations. There may be commercial implications of technical issues, e.g., real-time, memory size. Don't set up the customer for disappointment. Interactions with the customer can change not only customer perceptions but also dollar amounts in negotiations.

The following is from a book about life at Microsoft [Bick97]:

When a tough question comes up, "I don't know but I'll find out!" is a lot safer than bluffing. No one expects you to know everything. This answer shows you're honest,

you're not panicking in the face of a challenge, and you're responsive. Be sure to follow up with the answer!

## **Author**

David Saar, as told to Linda Rising.

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## **Pattern Name: *Mind Your Manners***

### **Problem**

When we interact with customers, we don't always think about etiquette, dress, and behavior.

### **Context**

You understand *It's a Relationship, Not a Sale*. You're trying to *Know the Customer* and working to *Build Trust*.

### **Forces**

- Some people think that considering etiquette, dress, and behavior are a waste of time.
- People can react strongly to etiquette, dress, and behavior they consider inappropriate. They may even take it personally.

### **Solution**

Mind your manners. Be polite. Be aware of body language. The way you dress and behave influences the way the customer sees you and our company.

Dress appropriately to meet customer expectations. Sometimes "business casual" is acceptable. At other times a suit is required, while on occasion, jeans are the norm. It helps to *Know the Customer*.

Show respect for everyone, including competitors.

Be especially careful in your interactions with others from our company in front of the customer.

### **Resulting Context**

Customers will feel that we are concerned about all aspects of our business interaction and are ready to share their concerns and issues with our products.

Don't be so focussed on minding your manners that your behavior is stiff or overly formal.

## Rationale

Common courtesy is so uncommon! Simple, thoughtful acts convey a concern for the other person's welfare that is essential in any business interaction.

Our workplace environment may be very casual. We may not always be aware of pleasantries when interacting with our team, but these are important in customer interaction.

How we treat each other is an important sign to the customer about how we treat people in general.

The following is from Mitchi Page:

I recently placed an order with a company. I asked when the new catalog was coming out. The reply, "Oh, our brilliant marketing department decided not to issue our new catalog until the first of the year," made me feel uneasy. When a customer contact makes sarcastic remarks about the company or someone in it, I feel uncomfortable dealing with them.

The following quote by Dave Thomas, founder of Wendy's Hamburgers, is from *Selling with Honor* [Kohn97].

Be nice to everyone. Be polite.

## Known Uses

Thanks to Karen Grover for pointing out the following article in the *Wall Street Journal* [Bounds+98]:

NovaCare Inc. once rejected a candidate for the job of top legal officer because he showed up for the interview in a casual outfit with a backpack. Even with better credentials, he wouldn't have passed muster because "he didn't look professional," says Gerry Johnson Geckle, a NovaCare vice president. The job went to a candidate who wore a dark suit and white dress shirt to the interview.

It can be just as fatal to flout casual codes. Elementary school teacher Susie Swafford reports she was turned down for several jobs in suburban Colorado schools because she overdressed for interviews. Ms. Swafford says she usually showed up in a linen suit and pumps, her hair and makeup flawless.

Big mistake. She met with one principal who wore faded shorts and propped her bare feet on a chair. Another school official interviewed her in jeans. They bluntly told Ms. Swafford that she looked like a "model" or "cheerleader," and that her fancy appearance intimidated other teachers.

## Author

David Saar, as told to Linda Rising.

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