

Managing the Customer: The Role Review

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My wife and I built a house this year, which is a great way to *really* learn project management. Prior to the start of construction, our builder met with us and did something that helped substantially with our involvement in the building process. He performed what might be called a Customer Role Review. Here's how it works.

The builder identified some of the major activities that would occur over the six-month course of the project. First, the land is cleared, then the foundation is poured. Next comes the plumbing rough-in, then framing, and so on. With each of these activities he gave a rough timetable. Then, he delivered the punch line: up to a certain time, we could easily make changes in each of the major house systems. Afterward, the changes would become much more difficult, much more expensive, and would cause schedule delays.

For example, it is easy to move a wall prior to framing. After framing, the move requires ripping out the old wall, and depending on what else has been done, may require changes to plumbing and electrical systems and sheet rock.

As part of the review, he also outlined a timetable for when he would need other major decisions from us, for example, carpet and wallpaper selections.

What our builder had done was simple and obvious, but usually neglected in project management. In short, he had mapped out not only the project schedule, but also *our* schedule - the one we as customers would have to follow to keep the project on schedule and budget.

It seems that many projects might benefit from such a review. Too often, project managers focus on the roles and responsibilities of project team members doing the work, and while this is important, it misses the critical role played by the customer. The Customer Role Review has two major benefits:

- **Clearly identifies the customer's responsibilities and schedule** - The customer in essence becomes another member of the team reporting to the project manager
- **Avoids misunderstandings later** - The role review is a gentle way of putting a customer on notice: Perform your role and the project will go smoothly; fail to perform your role and it will cost you.

What should be included in the Customer Role Review? Here are some guidelines:

- **Identify major milestones and schedule** - Milestones serve as indicators of significant activity and accomplishment, and this part of the review shows the customer what they need to contribute to achieve this accomplishment.
- **Highlight decisions needed from customer** - What information does the customer need to provide to the project team and when? This simple step greatly helps the customer plan what he or she needs to do.
- **Show the implications of changes** - Too often customers think that they can make changes at any time at no cost. This step highlights the fact that as the project progresses, changes become more expensive and time-consuming.
- **Start the "tickler" system** - On a regular basis remind the customer of upcoming activity and decisions that are needed. This is particularly important if your customer is not involved in the project on an ongoing basis.

The Customer Role Review can be a powerful tool to help projects run smoothly and avoid many of the problems often encountered with scope management. The review also helps customers see that they play an active and important part in the success of their project. Take it from a project customer: role reviews work!

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