

CONNECT TO THE CUSTOMER



Session Leader Guide

The more we can visualize the purpose of our work efforts in terms of how our solution will add value to our customer – the better we can understand and commit to the team goals. A good understanding of where our solution fits into the customer business operations and his/her intention and long term objectives will get us better connected to the customer and enhance the collaboration.

Additional benefits are that it can enhance the customer co-operation/dialogue, increase our ability to manage the customer requirements and enable us to work more proactively.

PURPOSE

To create a better understanding of how our solutions and performance will best contribute to the customer business operations.

To provide all stakeholders with an overall common purpose with the team, which will facilitate the customer cooperation/dialogue.

OBJECTIVE

A shared understanding and description of how the team connects to the customer vision and objectives in terms of Direction, Prerequisites and Dialogue.

PARTICIPANTS

The more team members that can participate the better. To provide value to the team, the minimum participants should be the team leader, 2-3 team members and customer representative(s).

TIME

The estimated time for this exercise is 3 – 4 hours depending on the size and complexity of the team and if it involves a visit to the customer premises.

BEFORE THE SESSION

1. Anchor the decision to do the exercise with your manager/chairman of the team and, where appropriate, with the Customer Account Manager.
2. Anchor the decision to do the exercise with your Customer.
3. Define who, when and where and book a meeting room.
4. Send out invitations at least two weeks before your meeting. Communicate meeting Purpose and Objective, when, where and who. Enclose the Agenda.
5. Prepare or select slides you intend to use
6. Make sure the meeting room is ready with all the material needed. You don't need more than a laptop, pc-projector and copies of the worksheets as handouts.
7. If you intend to use a meeting evaluation, have it prepared in advance (see page 172).
8. Try to come at least 30 minutes before everyone else.
9. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.

DURING THE SESSION

1. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting and ask if everyone will be able to stay during the whole meeting.
2. Introduce the exercise by reading out the steps to be taken. Clarify how you intend to use the material after the session. Make sure everyone understands the exercise. Give the opportunity for questions and concerns.
3. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember, the process is as important as the outcome.
4. Conclude the exercise by reading out your final conclusions. Clarify agreed actions by addressing who, when and how. Communicate the intended next steps.

AFTER THE SESSION

1. Document the outcome of the workshop (use the template if appropriate).
2. Write and send out minutes as soon as possible after the meeting. Enclose the documentation with the outcome and also slides that were shown (if requested by any of the participants).
3. Now that you have started to create a shared understanding of how to get connected with the customer, plan for a dialogue with your team as to how to align the team behaviour and priorities.

Agenda

(proposal and facilitator notes)

1. Introduction of the exercise	15 min
2. “Guided tour” at the Customer premises (optional)	60 – 120 min
To create a better understanding of the current situation and the user priorities, meet the users of your products or solutions and view the physical environment where it will impact.	
3. Individual Reflection	15 min
“Recall an occasion when you participated in a team where the collaboration with the customer was working perfectly.” What made it happen? Who was involved? What was the feeling and outcome of this team?	
4. Presentation of the Customer View	30 min
The customer presents Vision & Objectives, Priorities & Restrictions and Enablers & Critical Success Factors from his/her perspective. Allow questions for clarification during the presentation. Note down this information on flip chart(s). Put the flip chart(s) on a wall, where everyone can read it. (Use the template on page 65 if you want)	
5. Group Reflection	60 min
“How can your team meet and connect to the Customer View?” Note down the different responses on flip chart(s) under the heading “CONNECT” as they come up. Verify the responses towards the customer view and note where they are shared and agreed upon.	
6. Evaluation of the Exercise	15 min
“How did the exercise contribute to a shared view and understanding of the team, priorities, prerequisites and dialogue?” What have we learned as individuals and as a team? What are the key issues to bring with us in our future work together?	
7. Conclusion & End Up	15 min
Conclude the exercise by expressing your appreciation to the customer and the other participants.	

Connecting the Customer to the Team View

CUSTOMER Vision & Objectives	<-- CONNECT --> Why do we exist as a team?	TEAM VIEW Direction
Priorities & Restrictions	What do we need to pay special attention to?	Prerequisites
Enablers & Critical Success Factors	How should we create a cooperative working climate?	Dialogue