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Key Word	Responsibility Matrix	
Tags		
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## EXPLANATIONS AND EXPECTATIONS: TWO E'S TO AVOID TWO E'S

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Quick Summary: Upfront explanations can set proper expectations to avoid future exasperation.

### Abstract:

*Setting the proper expectations with customers is a crucial element in helping to ensure a high level of customer satisfaction. A Harry Chapin song lyric: "Empty spaces always asks for filling," illustrates the importance of setting expectations beforehand. Often, all that is required is an explanation of what should be expected and, equally important, what not to expect. All of us hate unexpected negative surprises. Most of them can be avoided with some preparatory work and communications.*

An alternative title for this article could be "How to Avoid Misunderstandings." We all fall into this trap from time to time of having to say: "Sorry, this is not what I meant," or "I should have told you that..." In most instances, the disconnect is simply a matter of not properly setting the correct expectations with someone else. After the fact, we often know exactly what we should have said before the misunderstanding occurred. In these situations, we hear the phrase: "Forgive and forget." Most of the time, others are willing to accept our apologies, but often, they have a hard time forgetting. For new companies attempting to establish a reputation in the market, innocent missteps can have long-term, even fatal impacts. So, Explain first to set the proper Expectations.

Two other "E's" can be avoided by setting the correct expectations after thorough explanations. They are feelings that the impacted party quickly generates. They are exasperated and the sense that the resulting explanation is an Excuse. In fact, the exact words used beforehand as an explanation can easily be assumed to be an excuse after the event has occurred.

New companies, with their fixation on establishing themselves in the market, often fall into the trap of transitioning from market hype to customer commitments. There is usually a large gap between what the company envisions to offer "someday" and what it delivers today. Customers focus on today's tangible offering and not the company's vision.

The extent of the need for explanations about a company's offering varies considerably. For example, a little explanation about a ream of printer paper is necessary beyond its size, color, weight, and the number of sheets in a package. On the other hand, a complex factory-floor process control system requires extensive explanations and a clear understanding of expectations. Falling somewhere in between are mobile apps, SaaS offerings, commodities and other products.

Setting someone else's expectations is a misnomer. Expectations are in the mind of the other party. All one can do is explain the future offering or situation and suggest to the other party what they may feel or experience. The goal is to eliminate negative surprises. A negative outcome may still occur, but it will not be a surprise, which could result in a knee-jerk reaction.

Each company should think about what could go wrong and disappoint their customers. Obviously, product defects and missed commitments top the list. I have found that there are six general categories that a company should consider, but none of them are required. Briefly, they are:

**Capabilities:** Aside from the offering's features and functions, describe its capacities. Can the offering provide "more of the same" as the customer expands its use? The driving range of an electric vehicle is an example.

**Limitations:** What are the "hard stops" that limit the offering? The number of simultaneous users of an online system is an example. For new offerings, perhaps for an MVP, may have initial limitations that will be removed with later versions.

**Schedule:** What are the time-related sequence of events that will occur? This issue is probably the most area that causes disconnects between suppliers and customers. As a starting point, all schedules should be based on relative and not absolute dates. For example, "Shipping will be made within two weeks after the receipt of an executed contract." This situation prevents, for example, a customer placing an order but leaving out a critical piece of information required to factory-configure a product. The customer may think that delivery will occur two weeks after the date of the PO. On the other hand, the supplier will not consider the delivery time commitment to begin until they receive all of the configuration information.

**Milestones:** Linked closely to schedule issues, tracking demonstrable activity completions can keep a project on track or provide indicators of potential delays as missed commitments occur. As an example, tracking the individual times of each runner in a relay race can help set the expectations of the overall result while the race is in progress.

**Acceptance or Exit Criteria:** Establishing what constitutes the "end" before starting helps eliminate "mission creep" in which no one is happy.

**Expectation Matrix:** This is the last category and probably, the most important. It is based on the notion that "good fences make good neighbors." An expectation or responsibility matrix consists of a four-column document. The first column briefly lists a specific activity. The second column lists the expected completion date. The date is best expressed in "weeks after" some previous activity. The third and fourth columns list the supplier and the customer respectively. Only one of the supplier and customer columns should contain a checkmark for each activity. That checkmark indicates who is responsible for the line-item activity being completed. A more detailed matrix would include a person or group as the responsible party. Being "responsible" does not necessarily require the person or group to perform the task. Instead, they are accountable for the completion of the activity. Ideally, there should be an equal number of activities for both the supplier and the customer. This arrangement reinforces a "partnering" relationship with a shared, common goal of success.

Some sales reps hesitate to bring these documents up during the selling stage in fear of "spooking" the prospect. The opposite is more likely to occur. A sales rep may view the receipt of the order as the end

of the journey, while prospects view it as the beginning of the implementation. These documents are in the best interest of both parties and can help avoid negative surprises later on.

Once created, the documents should be easy to edit for new customers. The Benjamin Franklin quote best sums up advanced preparation: "An ounce of prevention is worth a pound of cure."