

Managing the Customer's Expectations

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by Mark Carpenter

Increasingly, Macintosh developers find themselves face-to-face with the corporate world. Some are developing front ends for corporate databases and information systems. Others, acting primarily as consultants, are configuring hardware and software to accommodate corporate needs. Still others are creating “multimedia” applications that enable corporate customers to introduce their products more effectively, to communicate within their organizations, and to train their employees. My company, Santa Fe Interactive, falls into the latter category.

For more than four years, the team that now comprises Santa Fe Interactive has worked closely with numerous corporations. While the work has been both rewarding and frustrating, we've found that the best way to maximize the rewards and minimize the frustration is to manage our customers' expectations—an approach all Macintosh developers who provide services or products to corporations might find useful.

More Than Pushing Pixels. Developers who work with corporations must be prepared to act as strategic consultants. We find it helpful to keep in mind that, for a new customer, incorporating multimedia represents a major operational change. As we integrate traditional forms of corporate communications (company brochures, video and audio tapes, manuals, etc.) into a single multimedia presentation, our customers find such information more accessible and easier to manipulate. As happens when other kinds of technological advances are introduced, the way jobs are performed changes. Especially if the corporation is simultaneously converting to the Macintosh, we are often on the front line when our clients realize just how complex those changes can be.

To manage your customers' expectations under these circumstances, you must offer a compelling vision of the future as it relates to the service or product you provide, while simultaneously tempering those visions with checks on what is technically or logistically feasible. Hitting on the right mixture of vision and realism can be a real balancing act.

Your Customer's Education. Providing a realistic assessment of what is possible in large part depends on educating the customer. Before multimedia became a household word, developers worked with either interactive videodisc or the archaic CBT (computer-based training). Graphics were primitive at best and the programming—written for delivery systems developed by Sony, IBM, and others—required painfully long development cycles and considerable technical expertise to achieve what is considered

simple by today's standards. To make matters worse, much of the software used to create interactive programs on these platforms was (and still is) proprietary. Multimedia developers were forced to recreate the wheel daily. Many of our customers understood that producing interactive material could be a nightmare.

During the past three years, however, multimedia production tools have changed radically, and consequently customers approach multimedia development with a different attitude. Many recognize that the tools available for multimedia production require less technical expertise than the more traditional forms of software development, and they therefore make the assumption that multimedia production is a breeze.

Apple has helped promote this conception by proclaiming that, with HyperCard and a few other simple tools, *anybody* can create multimedia productions. While there's a modicum of truth in this claim, it misses an essential point: There are many levels of quality in multimedia design and production. As with video, there is home video, and there is professional video. The two are worlds apart.

A Familiar Sound. The evolution of multimedia is very similar to that of desktop publishing. Early on, no one really understood DTP. Desktop publishers were few and far between, their tools arcane. These days everyone's a desktop publisher; even word processing applications have desktop publishing features. But, any graphic designer can tell you, you need more than a Macintosh and the latest version of PageMaker to turn out a professional-looking publication.

We try to teach our customers early on that with new and better tools come new challenges and larger problems. These days, developers of multimedia applications regularly work with shorter time lines, smaller budgets, and with customers who want something truly unique—at times something that surpasses the capabilities of current technology. Naturally, the customer wants a finished product that makes an impact on the customer's organization. Apprising our customers of what can and what cannot be done as soon as possible reduces the number of headaches in the long run.

An Education of Your Own. Of course education goes both ways. Most developers don't specialize in a single industry, so they need to learn a customer's business and corporate jargon quickly. We've found a few effective ways to do this. Naturally, we begin by talking with our customers. But we also request company and product literature, conduct a computer search on the company using online services such as InfoTrac and Dow Jones News/Retrieval, and contact an Apple representative in the region. (If your customer is fairly large, chances are Apple will know something about its operations.) Only when you have a fairly thorough understanding of your customer's business can you assess your customer's needs.

By approaching your customer's needs as a *business* problem and not just a problem that your service or product addresses, you can identify several areas where your skills can be applied, thereby broadening the scope of services that you can provide. Say your customer feels the need to better communicate the features and benefits of their product at an upcoming trade show. Chances are it's not only the trade show they need help with. Other audiences—a sales force or technical support staff, for example—might also benefit from repackaging your customer's information. We've found that we often have the opportunity to reinforce a customer's initial idea by suggesting a greater return on investment. Such added value helps both parties.

Seeing is Believing. Demos play a large part in educating customers and managing expectations. Customers typically have a hard time imagining how a multimedia application produced for any purpose other than their own relates to their problem or vision. Therefore, at the proposal stage (or even before), creating a custom demo helps your customer understand the possibilities and limitations of the project.

Simple slide shows with little, if any, interaction make the best demos. You can suggest numerous ideas within a simple presentation. Content, including images and text, can be taken from information you receive from your customer during the education phase. If you keep it simple, you can justify the cost of a demo as the descriptive part of a proposal.

Negotiating After the Facts. Once you know your customers and their needs and they have a reasonably clear idea of what you can (and can't) do for them, you'll be able to define a project that is workable and, ultimately, successful. Even after this mutual education process, however, when it comes to defining a project in detail, our customers still aren't exactly sure just what it is they want.

Yet a clear project definition is essential. If you're not careful, you can wind up altering the design of your product or service throughout development, and that can be costly. Depending on the customer and complexity of the project, it can be very hard to protest changes without appearing uncooperative or worse. The more detailed your project definition is the less frustration you are apt to experience.

Project definition can be approached in a couple of different ways. Ideally, you should negotiate a separate contract for a pre-design document. In the pre-design phase, you can get a firm grip on the content your customer wants. After a *thorough* analysis of the content and some preliminary designs, you can recommend how your customer might better prepare their material for a multimedia format.

If, however, your customers don't feel comfortable with a pre-design agreement but want to proceed, it's up to you to set constraints on their right to make changes to your design later in the project. This sounds a lot easier than it is. But beginning production before a design is fully developed and documented in a way that all parties can agree on can present serious problems down the line.

A Customer Is a Customer, Yes It Is. Much of what I've had to say applies directly to developers of multimedia applications. But much of it also applies to developers of other corporate Macintosh applications and services. Quite often our products and services are new to corporate customers and those customers need a fair amount of guidance. But keeping in mind a clear definition of your role and the role of your customer is just as critical. Working with corporate customers is exciting and rewarding—as long as you successfully manage expectations.

Mark Carpenter is president of Santa Fe Interactive, a company that develops interactive brochures, training applications, and a host of other multimedia programs. It is based in Santa Fe, New Mexico.

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