SERVICE EXCELLENCE AS PROJECT MANAGERS

Mark Kerrigan¹ and Prof. Russel Anderson²

¹Tel: 082 854 1900, E-mail: mark@stringlite.co.za
²Tel: 011 327 7044, Fax: 011 327 7043

ABSTRACT

A project's success is not only judged according to how well we manage the time, cost, quality equilibrium but also on how well we identify and manage our client’s expectations. To be seen as a success our projects must have:

- General acceptance and agreement on the project's goals and objectives between the client and the project team.
- A plan or “road map” with clear responsibilities that is used to measure progress along the way.
- Simple, constant and effective communication to the right people at the right time.
- A well-defined and controlled scope.
- Top management support and “buy in”

The more time we spend identifying and clarifying expectations, assumptions and the project's versus products scope at the beginning, the more likely we are to influence the end success of a project.

As project managers we have fantastic tools, techniques, inputs, outputs, templates, software and incredible communication ability brought to us through the Internet and technology in general.

but……..

- Why do we often feel invisible when projects are running smoothly and the finger pointers when they are not?
- Why do we still have clients that do not feel that their expectations have been met?

Because we spend time managing expectations but not enough time managing perceptions!

1. OPENING STATEMENT

How do we as project managers become involved with and stay married to our clients?

Effective project closure is how well we apply the lessons learned from a completed project for future application and projects effectively. This implies a longer-term relationship than just the initial life cycle of the original project.

In the process of looking for clients and business alliances we were often reminded of the similarities in looking for a lover and life partner and how the process could be used to explain our overall project methodology. The effective building of relationships also goes through distinct phases, once the initial rush of first love has settled in and been replaced by the cold harsh realities of everyday life we soon realise that in order to make the relationship work we have to work at it.

As a marketer I was also reminded of how the process of building business relationships on a one to one basis involves the same steps, the problem comes in when we start to look at the gaps in a service delivery that are often caused by expectations versus perceptions.
The case study is a combination of self examination and external feedback, the crux of what we wish to share with you is an approach that we have taken that seeks to manage not only a client’s expectation of our service but also manages the perceptions of our actual service delivery.

Our focus on closing the gaps in our perceived or real service delivery is treated as part of every projects overall scope.

2. THE CURRENT SITUATION-HOW DID WE GET HERE?

Project management is often referred to as an art that is informed by a science:
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**Because we spend time managing expectations but not enough time managing perceptions!**

A Gap in service quality or delivery is when what was expected to happen and what is perceived to have happened is not the same. This aspect must treated as an integral part of a projects overall scope.

If we are to ensure that functional and performance quality standards have been achieved in relation to the quality of the perceived service delivery in the clients mind. As project managers we must also close any gaps in their perceptions of our service.

The key difference between the marketing of services versus products is the tangibility factor. **“Tangible”- perceptive by touch, definitive and clearly intelligible.**

The “moment of truth” is that instance that the consumer perceives that the purchase of your product or service is exactly what he perceives will satisfy his needs at that time.

Customers’ forms their **expectations** of your service from, past experiences with you, word of mouth and external communications that drive an internally perceived need.
The key factors that influence their Perceptions of your service quality are:

- **Tangibles** - Previous products and outcomes, employees and facilities.
- **Assurance** - Employees must know what they are talking about and convey this clearly.
- **Empathy** - Individualised attention and the ability to “hear” a client correctly.
- **Reliability** - Keeping the promises we make.
- **Responsiveness** - Change requests, corrective action or environmental influencers.

When expectations do not match perceptions we have gaps in our service delivery. A quick diagram of the main service gaps follows:

2.1 What approaches have we taken?

When we started to embark on a management by project approach we initially scared the living daylights out of many of our clients and external service providers, we would spend 4 to 5 days preparing detailed project plans and scope or statement of work documents indicating almost when the client would be expected to breath by. We then followed a route that a simple initiation overview was followed and once a contract was signed we would dump pages and pages of documents on a clients desk. It's no use having all the details there though if people do not use them.

We have looked at collaborative web interfaces such as Project 2000 but these also require a clients time to click through to the detail needed if and when he has been prompted enough times to do so.

We now follow a far more fluid approach and use a process of progressive elaboration within the confines of an overall summary plan.

The 5 Service Gaps
2.2. Our key Focus and predictors for a successful project are:

**Scope- Scope- Scope- Expectations and Perceptions**
Simple one page documents are sent out that are best termed "executive summaries". The summaries have the ability to be linked to drill down information; the aim is eventually to have total transparency at the level of consumption desired at any given time.

It is no use us completing our scope in a project and the client or an external service provider has not completed any of their responsibilities, a large amount of time is spent defining and assigning specific interdependent activities and responsibilities as early as possible in a project.

**Tangibilisation of our Service Cycle**
The provision of Marketing Tools or products is similar in nature to some one purchasing a fast food hamburger in that both require a back end service aspect that results in a front end tangible product. Think about how much quicker a customer would become impatient while waiting for his hamburger if he could not see the behind the scenes service delivery in progress! The fast food chain has effectively tangibilised an aspect of their service delivery that the customer may not have necessarily been aware of.

We seek to tangibilised our back end service delivery wherever and whenever possible as part of the project scope in order to address this aspect of visibility and tangibility.

How we tangibilise our service and the stages that are followed to check whether or not we are being successful is built into each and every projects overall scope. Our scope is always separated between actual product or outcome scope to the overall scope of the project itself.

Our quality parameters are not only based on the project performance and functionality aspects against original intention but we treat customer service as a planned and managed activity throughout a project life cycle.

3. **WHAT DO WE WANT TO ACHIEVE?**

1. The ability to predict whether or not we will have a successful outcome and a happy client at the end of a project.
2. What will be the most practical approach to achieve similar project goals and objectives?
3. Meeting and getting married to the right partners.

3.1. Specific outcomes we are after.
1. Effective balancing of customer expectations and perceptions in relation to the constraints of time, cost and quality. (Keep the equilibrium)
2. Simple, easy to use road maps for typical projects.
3. Early warning signs that a project may not be feasible under the current situation or assumptions and the ability to call a No-Go with confidence.
4. Effective tangibilisation of the back end of our service delivery- when things are happening behind the scenes let people know about it!
5. Clarification and protection of the creative process.
6. Effective decomposition of end visions into more realistic steps and stages.
What tangible experience do we wish to leave our clients with?

<table>
<thead>
<tr>
<th>Bad Experience</th>
<th>Excellent Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bad Expectation</strong></td>
<td><strong>Excellent Expectation</strong></td>
</tr>
<tr>
<td>No Gap</td>
<td>Large gap</td>
</tr>
<tr>
<td>Confirmation of bad expectation</td>
<td>A Pleasant Surprise</td>
</tr>
<tr>
<td>Large gap</td>
<td>No Gap</td>
</tr>
<tr>
<td>Unpleasant Surprise</td>
<td>Confirmation of excellent service</td>
</tr>
</tbody>
</table>

4. AN INTRODUCTION TO OUR METHODOLOGY

“I want a nice logo in a warmish green colour”

A statement like that about says it all, we need to understand what the client is thinking about, what is driving their request and what they hope to achieve. We need to explain clearly and simply how the tangible final outcome is developed, how long it usually takes and exactly what role they as the client must play in order for the project to be a success.

On top of that we need to ensure an environment that is as free and easy as possible for the creative process yet is still driven by schedules and deadlines.

The way we approach our projects has been compared to a typical relationship leading to marriage, along the way we seek to close any gaps in our ability to satisfy a client both functionally and emotionally.

For the purposes of this discussion we have focused on our overall scope management and prediction and how we seek to close the 5 main gaps in service delivery.

**Our overall approach:**

*How we orientate a new client*

*Fig 2-*This is an example of what we briefly indicate to a client as being our overall methodology, clients that have not worked with us before are given a full overview of exactly what we do, do not do and how we typically go about doing things.

If we have a Gantt chart from a similar project then we use these to indicate how projects often progress and where the key delays or problems usually are.

**Feeding the creative process** The 8th Day is a creative think tank initiated by StringLite. It is a non profit collaborative effort between designers, artists and creative companies. The key purpose of the 8th Day is to raise the standards of our individual endeavors through the sharing of ideas, concepts and techniques. Clients are welcome to join discussions or sessions, pose questions and have them brainstormed by the group.
4.1. Preliminaries – The Dating game

The preliminary phases of our project methodology are like a single person that is looking for a partner, it is an ongoing process that is adjusted according to our experiences. The market place and our clients are also building their own understanding of us based on their past experiences with us, word of mouth or external forms of communication that may highlight or indicate a possible need. It is during this dating game period that we seek to close gap 1 in our service delivery.

**GAP 1-The Client wants this, we think he wants that!**

The two key factors that cause this gap are;
1. Not correctly segmenting or understanding your target market.
2. Chasing new business instead of building relationships.
4.1.1. Scope Management-Overall scope of the company

Our Overall scope management ensures that products and services that are working are improved on and those that do not add value to our clients are dropped.

What we do and what we do not do is constantly refined according to feedback and project post mortems. The questions we constantly ask are the following:
- Who are we, what do we do, and what do we not do.
- Who needs us and why do they need us?
- What products and services should we be developing?
- What products and services are not livings up to their expectations?
- Who else do we need to supplement our value chains?

4.1.2. The Toolbox we use
- Environmental analysis- changes in technology or consumer patterns.
- Competitive observation and looking for ways to combine synergistic scope between one another.
- Project Post mortems- what worked, what were the issues and lessons learned?
- Newsletters and client surveys.

4.1.3. The Outcomes we seek to Achieve
- A constant adaptation to our overall scope in subtle non-disruptive ways.
- An accurate understanding of our target markets and why we are serving them.
- The establishment of an effective and flexible external resource pool.
- To constantly be on the look out for white space (minimal competition) where we can add value.
- We know who our target markets are and we focus on building relationships and not on chasing every thing that catches our roving eyes.

The dating game effectively changes when we have identified and made contact with a potential business partner. That does not mean that this part of our process stops- we believe in managed polygamy!
4.2. Initiation – The Courtship

**INITIATION - THE COURTSHIP (GAP # 2)**

### Adapting to changing needs?

**Our Understanding of what our customers need**

This is what we have done before
Overall needs and objectives
Top level WBS

**GAP 2**

**How we translate this into what we do and are capable of.**

**Scope - Conceptual Development**

This is what we have done before
Overall needs and objectives
Top level WBS

What is the Overall Idea?
Is the idea feasible?

- Risks and Opportunities
- Sales & Demonstration
- Feedback and requests
- Environmental change

**The ToolBox we use**

Sales tool kit)
Benchmarks & Project Post mortems
Project Initiation & Benchmark

**What do we focus on?**

What and why
Feasibility
Responsiveness

**What we want our customers to experience:**

ASSURANCE, TANGIBLE PROOF, RESPONSIVENESS

**Outcomes**

Preliminary TSOW, Mock ups and demo’s, E-mail Project Summary,

**Go / No Go Decision**

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*Now that we have exchanged photos and vital statistics lets meet face to face and show and tell!*

Once we have identified a suitable “partner” or have decided that existing clients could benefit from our services we enter the “wining and dining” or courtship stage. The key objective is to determine whether or not we can work with a customer and whether they can work with us, will the relationship be mutually beneficial and what are the overall expectations from each party?

It is during the courtship phases that we seek to close gap 2.

**GAP 2 - How we adapt our products and service.**
• The most important factor contributing to gap 2 is when a company does not have a standardised and controlled process for service quality enhancement or there is little way other than a “sit by Nelly” approach to adapting internal processes and services to actual outcomes to a client.

4.2.1. Scope- General Indication and Conceptual Development
Initial conceptual development focuses around very broad parameters of what should be done, e.g. 1 x 20 minute multi media presentation. We try to indicate and demonstrate what the final outcome would more or less be and whether or not it would be what the client needs. The sales process does not go into specific project scope details with a client but seeks to indicate what the next steps would be in the project if a go ahead was obtained. The key objective of the sales process is to demonstrate;

• This is what we do and don’t do.
• This is what has worked before.
• This is more or less how we would handle the project.
• What external service would be required?

4.2.2. The Tool Box we use
• Demonstration files. (Sales tool kit) built from previous projects
• E-mail teasers and mock-ups.
• Benchmarks & Project Post mortems.
• Project Initiation & Benchmark questions.

4.2.3. What do we focus on?
• A good understanding of how we would add value to the customer?
• An initial indication of the projects feasibility and how well the customer understands their role.
• Drivers for change and any specific windows of opportunity that are critical to the project success.
4.3. Set Up and Planning – The Engagement

**SET-UP & PLANNING- THE ENGAGEMENT (GAP # 3)**

**What can stop this from working?**

- **Clients Roles & Responsibilities?**
- **Outsource Roles & Responsibilities?**

**Scope Definition-Pre Production**
- What is included, specific exclusions
- Interdependencies and Customers Scope
- External Service providers Scope

**Scope Management Plan**
- Change control
- Strategic Alignment
- Feedback and Review stages

**What do we focus on?**
- Scope decomposition
- Roles and Responsibilities
- Strategic alignment
- Constraints and assumptions
- Objectives
- Management Buy Inn

**The ToolBox we use**
- Pre-Production Agendas
- Products and services Database
- Project Health Checks
- Resource Pools and Team
- Collaboration
- Contractual Agreements

**OUT-PUTS**

- **Summary Pages**
- **Drill downs**
- **Project Logs**

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Are we sure we know all the rules and exactly what is required to make the relationship or project work? Do we have a stakeholder that is going to be impossible to manage such as an unreasonable mother in law?

The service gap we are trying to close is gap3.

**GAP 3-What can stop us from achieving our promised service?**
When clients or external service providers do not adequately understand the nature and importance of their roles a situation of finger pointing and apportionment of blame often occurs. By focusing on the importance and significance of a client’s role as early as possible in the project we are able to secure better “buy in” and participation and can also see very quickly whether or not the client is going to work with versus against us.

During set-up and planning phase we ensure that the original objectives are still feasible. The key areas of scope management that we focus on are specific inclusions, exclusions, interdependencies and clarification of the clients’ roles and responsibility during the project. It is only during the pre-production meeting that initial conceptual scope starts to be decomposed.

4.3.1 The Pre-production meeting-Scope Definition and verification
Pre-production focuses on getting everyone to understand how and what the next stages of scope development will be. Timelines are discussed and expected delivery dates agreed on. The initial scope indicated in the preliminary Tender and Statement of work is discussed and initial decomposition is indicated, if the client wishes to know the full procedure to develop a similar deliverable we have a deliverables database that can be accessed. The key issues surrounding scope that we focus on are;

- What is included
- Specific exclusions for this stage
- Critical Scope Interdependencies
- Customers Scope
- External Service providers Scope

4.3.2 Scope-Verification and authorisation/ Management Plan
Scope management is centred on how changes will be handled, keeping an eye on both parties strategic alignment and what the process for feedback and review will be.

4.3.3 What do we focus on? - Roles & Responsibilities

- Conceptual Scope decomposition.
- Roles and Responsibilities.
- Does the client understand the process to be followed?
- Strategic alignment and drivers for change.
- Constraints and assumptions in relation to other projects.
- Initial objectives and windows of opportunity.
- Top level Management and Sponsor Buy In?

4.3.4 The Tool Box we use

- Pre-Production Agenda send outs.
- Products and services Database.
- Project Health Checks.
- Resource Pools and Team Collaboration.
- Contractual Agreements
4.3.5. Outcomes of this phase
Once initial and conceptual scope has been decomposed to an acceptable level the required project team and resources are re-clarified if they have changed from initiation stage. Contractual documents are signed off that not only focus on how costs are to be managed but also specifically on how scope will be managed, the send outs at this stage are:

**Summary pages**
- Project announcement
- Project Team
- Scope Statement
- Baseline schedule
- Baseline costs

**Drill downs**
- Project set-up notes.
- Roles & Responsibilities
- Reviews & Format of C.
- Deliverables Database.
- Project Schedules.
- Budgets, Cashflows.

**Project Logs**
- Risks & Issues.
- Scope changes.
- Communication
- Procurement.
- Contractual.

The original intention of an engagement period in the past was to see if the two people would be suitable for each other and to plan the actual logistics of getting married successfully and happily in a typical fairytale setting.

Once we know that the initial projects objectives are still feasible and all relevant contracts and documents have been thoroughly checked and accepted then we get married, married to the project and married to the management of our clients’ expectations and perceptions.

By clearly establishing and formalising the “rules” of a project we are far more able to get our clients and external service providers to understand both the nature and importance of their roles and in so doing close gap # 3
Did you remember to get pick up the mother in laws denture cream on the way home?

How often do we hear that the key to a good marriage is effective communication? Are we living up to all our promises? How do we ensure that peaceful assurance that other party has your best interests at heart? The service gap that we seek to close is gap 4.

**GAP 4-Getting it done, adapting to changes and managing promises with good communication.**
Keeping everyone informed in a simple yet effective way is paramount to keeping a client up to date with what is happening behind the scenes, when a client is unaware of what is happening there is no tangible reason for them to feel that they are receiving the service promised. If we are late in a project the most important factor to ensure is that the adjusted milestones that we issue are adhered to and treated like gold, when we let a customer down once, we have a chance to make it right, when we fail in our promise again we are very quickly heading to divorce.

4.4.1. Scope- Reporting and Change Control
Execution and control phases of the project concentrate on pro-active identification of possible problems and corrective action before they occur. Ensuring the right things are done at the right time and constantly explaining and updating why activities are taking the time they are.

There is usually a very well pre-determined critical path in our projects, there is no use in completing the final layout of an advert if the extent and nature of copy are to change, 3 words can have the effect that an entire layout must be re-done.

Our other key focus is ensuring that scope creep is kept to a minimum, so often we have a case that a new poster looks so stunning that a client decides to change their logo at the same time, this process is a three to four week one so the impact it can have on final delivery for e.g. an exhibition can be disastrous.

4.4.2. What do we focus on?
• Simple yet effective communication through the use of summary pages and drill down lists.
• Constant risk identification and response management before problems occur.

When ever there is a change to scope that can affect the overall projects goals and objectives these are highlighted incessantly until the original objectives have been revised and accepted by the client and project team.

By focusing on our clients roles and scope as well as our own we are able to ensure that they understand or at least acknowledge the importance of their role in the project, when we are unable to perform our role due to the client having a higher priority to take care of we are not the ones that are blamed for a project schedule being out and the relationship remains on an even keel. Gap 4 = closed!
Remember that a client forms their expectations of your service from their past experiences, word of mouth and communication received.

They evaluate your service according to tangibles, assurances, empathy, reliability and responsiveness.

When our clients’ perceptions of our service match their expectations we have effectively closed the final and most important gap of all.

**GAP 5- Expected service equals perceived service.**
5. QUESTIONS AND FEEDBACK

- What are our scope threads?
  - Drivers for change and objectives.
  - Who needs us and why?
  - What is and is not working.
  - Scope interdependencies that are external to our responsibility.
  - Project versus products scope.
  - Service gaps are treated as part of every projects scope.
  - Top management and sponsor “buy in”

- What is white space?
  A market position that you occupy that has minimal competition or where your service offering is totally unique.

6. IN CLOSING

A clients expectations and experiences apply both to process and outcome related activities, the process activities accompanying a service are evaluated by a client in conjunction with the outputs they receive. It is no use having amazingly effective processes behind the scenes if the client is not aware of them or does not understand how they are being used to their benefit.

By integrating effective service standards into each and every projects scope, we have focused on closing the 5 main gaps in service delivery, the key for us has been how we tangibilised these aspects, project closures are never project terminations and we often spend more time at the end of a project in analysis and application of lessons learned for the future than originally spent at the start.

Effective Scope planning and the tangibilisation of our back end service delivery have become our key predictors for a successful project, our company is growing very steadily and our approach has made it possible to be extremely fluid yet organised, we do not have large overheads and are able to expand and contract our business project by project ensuring complete sustainability from day one, it is working and we are all having a lot of fun at the same time. Looking at the common sense areas of typical projects best sums up the benefits we are achieving. At all times we know:

**What must be done?**

- Our clients, external service providers and StringLite know where we are going ahead of time.
- We know what has worked before and where the problems have been.
- We know if we the right people for the job and who else we need.

**Why must it be done?**

- An accurate understanding of the clients expected and perceived needs.
- We have a good ability to understand the actual drivers for change not always being expressed.

**Who must do what?**

- Our clients and service providers understand and realise the importance of their roles and responsibilities.
- We are able to get the most from the creative environment within the constraints of a scientific process.
**What must be done by when?**
- How long typical projects like this take.
- What are the critical milestones and handover points.
- What is the key event or date that is being targeted and why?
- Can it be done in time?

**How much will it cost?**
- We are able to accurately predict costs.

**Did it work?**
- We are able to effectively measure actual performance from a functionality point of view and from a perceived service point of view.
- We have a ever growing database of lessons learned, warning signs and No-Go parameters that enable us and our clients to stop a project before money is wasted.

Our clients are confident of our abilities and understand that we manage their product as much as we manage the project and have their best interests at heart.

We have not lost a single client to date, have never had egg on our face even after pulling out all the stops and have entered into longer-term relationships once we have completed initial projects.

We are getting married to our clients, it takes work but the rewards are excellent, costs are reduced and efficiency is increased each and every time.

**GET MARRIED TO YOUR CLIENTS AND CLOSE THE GAP BETWEEN YOUR STAKEHOLDERS EXPECTATION AND PERCEPTIONS**

**Mark Kerrigan**

Mark Kerrigan is a marketer by qualification, after spending 5 years in the construction and development industry I had fallen in love with Project Management, I have been self studying under the mentorship of Prof. Russell Anderson since mid to late 90's and have completed projects as diverse as Employment Equity Delphi programmes to complete Strategic re-engineering of companies into a combination of project management and ISO 9001-2000 quality management systems.