

CUSTOMER-SERVICE PROVIDER RELATIONSHIPS

IS YOURS A BLESSING OR A NIGHTMARE?

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We are all dependent on service providers for our businesses to succeed. The better you manage that relationship, the more successful you will be in achieving your goals in a cost-effective manner. The relationship is a two-way street. Service providers also depend on customers to enable a successful deliverable, so it is important to prepare the following:

Initial planning: Spend a good amount of time upfront reviewing your business strategy, your marketing goals, and your budget with your service provider. Confirm in writing the critical issues, e.g., the expectations, the implementation phases, required deadlines and deliverables. Indicate your preferences.

Strategic vs. tactical goals: Plan the project with a long-term strategic perspective, but implement in smaller phases. By breaking down a project into smaller deliverables, you are giv-

ing yourself a chance to review progress in a manageable approach. Once you are comfortable with the results of one phase, then you can proceed with the next step (this may help your budget process too.) A critical benefit to this approach is that things change rapidly and you may no longer want the original approach. With a phased approach, you are cutting your losses and allowing yourself and your provider to change directions in a more cost-effective manner.

Documentation is critical: The larger the project, the more critical documentation becomes. Samples include account information, login information, vendor contacts, a list of directories where everything is located, a list of all the hardware and software products that have been used in the implementation and, where appropriate, how to use the solution. Imagine transitioning to a new service

provider in the middle of a project without such documentation or getting a deliverable that you don't know how to use!

Solution alternatives: When a service provider presents an approach or a solution make sure that the benefits, alternatives, and issues are presented to you before committing to that solution. This analysis brings many benefits. Half the battle is in knowing what to ask! This analysis enables customers to realize what they really want in their project deliverables. This reduces much misinterpretation. It also shows your service provider's abilities.

In my 20 years of experience with global, multi-million dollar initiatives, as well as with low-cost projects, I found that careful management of the services is critical to the success of the projects. Whether a company is large or small, the same principles apply. ■



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