



# NLIT 2019 Boise, Idaho

Tom Seals  
Infrastructure Operations Manager, SNL



# Setting and Managing Customer Expectations

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# Introduction

- My background
  - 40+ years in customer service
  - 19 years at Sandia National Labs
- Disclaimers
  - I'm average
  - I like Processes
  - I steal the ideas of others  
(whenever I can!)

# Why is This Important?

The success of every personal or business interaction is dependent on knowing and meeting expectations.

- Co-workers
- Customers
- Spouse
- Friends
- Example – Dancing





# Let's Get Started!



# 100,000 Expectations!

Define customer expectations

What do you think?

- ▶ "Expectations are your client's vision of a future state or action, **usually unstated** but which is critical to your success." Chakravarthy Kaustav
- ▶ "One of the most critical parts of a project that is usually not completely known and not well managed" Tom Seals

# 100,000 Expectations!

Whether the expectations are rational or irrational, valid or invalid, is irrelevant. Everything else is secondary.

# Delta Principle

*The quality of your customers' experiences is not a direct result of the objective quality of your products or services. Instead, customer satisfaction is a more a function of how closely your customers' experiences with your business conform with their expectations." George Colombo*

# Delta Principle

*“No matter how good your stuff is, if it’s not what they wanted, they won’t be happy”* Tom Seals

- Gold Plating
  - House Cleaning
  - Ordering a To-Go Cup
  - Providing customer a Widget
    - » 100,000 expectations

# “Ok Tom, Tell Me How To Do Better”

- Using the Delta Principle
  - Frame your customers expectations skillfully
    - How fast do you need it?
    - How much do you expect to pay?
    - What are the most important items to you?
    - Probe for hidden expectations - Detective

# Using the Delta Principle

- Deliver on those expectations clearly and reliably
  - Service Delays – communicate!
- Continue to probe for new or changed expectations
  - Put the customer on a couch
  - COMMUNICATE!
    - Most customer service failures are a failure to communicate.



# The Platinum Rule

# The Platinum Rule by Dr. Tony Alessandra

- The Golden Rule – “Do unto others as you would have them do unto you.”
  - Give them what *I* want
- The Platinum Rule - "Treat others the way **they** want to be treated."
  - Figure out what *they* want and give it to them!
  - Example –
    - Installing a Network Box



# Behavioral Styles

The Platinum Rule divides behavioral preferences into four basic styles:

- **Director**
- **Socializer**
- **Relater**
- **Thinker**



Everyone possesses qualities of each style but everyone has a dominant style.

# Directors

**They are Firm and forceful, confident and competitive, decisive and determined risk-takers.**

Time sensitive – Don't waste their time

Be organized and get to the point

Finishing a sentence

Give them bottom line information

Argue with facts not feelings

In general, be efficient and competent



# Socializers

Are friendly, enthusiastic, like to be where the action is. They are Risk takers who base actions on intuition and are not inclined to verify information. They will assume someone else will do it.

- Support their ideas, goals, opinions, and dreams
- They are people oriented so give them time to socialize
- In general, be interested in them



# Thinkers

Thinkers are analytical, persistent, systematic people who enjoy problem-solving. They enjoy perfecting processes and working toward tangible results.

- Time sensitive
- Want details
- Be systematic, logical, and exact
- Give them time to make decisions and work independently
- In general, be thorough, well-prepared, detail-oriented, business-like, and patient



# Relaters

They are the most people-oriented of the four styles. Relaters are excellent listeners, devoted friends, and loyal employees.

- Relationship oriented
- Avoid risk and like the status quo
- Slow decision makers
- Talk in terms of feelings not facts
- Give them time to solicit co-workers opinions
- In general, be non threatening and sincere



# The Sunset Principle

Don't let the sun set on a customer waiting to hear from you.

- Especially when topic is an expectation of time
- Email – You received and are working on it
- Avoid overkill.





# The Strategy

# Strategy - Start Using it today!

Set Expectations before you ever do business with your customers.

- When meeting customers
  - Determine their style
  - Set expectations
  - Probe for unknown expectations
  - Continue to work expectations throughout the job or project.

# Strategy

- Use the Platinum rule
  - Give them what they want!
  - 4 Behavioral Styles – D-S-T-R
- Use the Delta Principle
  - Search for Expectations



