



## Leaders as Strong Customers

### Introduction

The role of a Leader is to move an organization forward toward a vision. This requires leaders to excel in inspiring and mobilizing an organization and to be a strong customer for the promises that individuals, teams and other groups make to contribute to achieving that vision. What makes a strong customer and why is it so important for a leader to have these skills?

In this paper we will explore the key steps and skills in becoming an effective customer. Without this expertise, at best there will be wasted effort, wastage of resources and disaffected performers. At worst, the leader's vision and goals will not be realized.

The ideas and background to this paper are based on material from Fernando Flores and made accessible by Robert Dunham in the Coaching Excellence in Organization program sponsored jointly by the Newfield Network and the Institute of Generative Leadership.

### Some questions to consider

What does the term 'customer' mean to you? What does it take for you to be satisfied as a customer? How will those who take action on your behalf (ie performers) know what it will take for you to be satisfied and how will they know if they have been successful in meeting your requirements? Where do you need to be a customer – as distinct from being the performer? Are you a strong customer? Where are you currently being let down?

***As you think about this topic, take a moment to bring to mind a situation that isn't working out for you, as you would like. How might you act differently? Your example could be a work, social or family setting?***

### Defining Customers

We all have an intuitive idea of what a customer and what a performer is. For this discussion we define a customer as someone with a specific need that is satisfied through the actions of others. Customers make requests. Performers fulfill requests or make offers designed to address the needs of their customers.

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## **Declaring breakdowns**

We define a breakdown as anything that is happening or has happened that will result in an unwanted or undesirable outcome. For example a car breakdown is something that will cause you to be late for an appointment or result in unbudgeted expense.

Breakdowns can be thought of as problems that need to be addressed. However they may also be opportunities. Leaders will sometimes determine that to keep on doing things as usual won't deliver the required results. They then declare a breakdown and set in progress a new series of actions designed to bring about a different future. Declaring a breakdown brings about a change in what happens next.

A crucial role for Leaders is in deciding which conversations the organization needs to have, including declaring breakdowns.

## ***What are some of the breakdowns that you need to declare in order to successfully deliver on your goals?***

### **Deciding what is needed**

Once a breakdown has been declared, it is then important to determine what is needed to address the breakdown. Depending on the complexity of the challenge, this might require a phone call to a tow truck or convening a group of specialists to address the concern. This phase ends with a request or an offer designed to take care of the challenge, involving other people.

The quality and depth of thinking at this stage is crucial to the eventual outcome. Insufficient consideration of the problem may result in a perfect set of actions, well executed but addressing the wrong issue. This will be the subject of another paper.

Once the need is effectively nailed down it is the request that moves us into action.

### **Making requests**

Effective leaders and effective customers make clear and specific requests with clear criteria for success. What constitutes an effective request?

A lot of us live with uncommunicated expectations and hope that the other person will guess what is needed. This may be because:

- We don't like making requests – 'don't you think it is warm in here' is a subtler and potentially more miss-able request than 'please will you turn down the thermostat'.
- Other times we may think that something is obvious and doesn't need to be stated, either because it is a cultural norm – 'please will you get me some water, and in a glass' – or because it is common sense – 'what else would I have

- wanted'? or
- We don't have the request straight yet.

On the other side of the coin, performers sometimes try and guess the needs of senior leaders based on an innocent question or enquiry. I have seen whole programs of work set off because a senior leader asked a question which seemed to imply a request to take action, and which subsequently was seen to be either unnecessary or inappropriate. It is important for leaders to be aware of how others are listening to them, and being clear when they are **not** making requests.

We'll talk about effective performers another time, but effective customers make explicit, direct, unambiguous requests without making assumptions. In the next section we will discuss how the performer and customer get on the same page. It is the leader's responsibility to ensure that the request is understood. With increasingly global and remote communications this is particularly important and a challenge.

An effective request recognizes that the performer may not only agree to the request, but also decline to act, suggest something different or need time to figure out their response. If the customer isn't prepared to accept these possibilities, then the request becomes a demand or an order. In business organizations, leaders should use orders sparingly and save them for issues related to safety or legal issues or those affecting short-term viability.

Effective customers have a clear idea of what they want when they make the request. If they are not clear, then they are not ready to make the request but need to spend more time figuring out what they want.

*You wouldn't approach the McDonald's drive-through until you know what you want and certainly not leave it to the servers to figure it out for you!*

### **Conditions of Satisfaction**

Before a commitment to deliver the work can be finally agreed, both the customer and performer need to be on the same page regarding what it will take to satisfy the customer. Strong customers will lead this discussion. We can think of conditions of satisfaction consisting of 4 parts:

- a) The unwritten cultural standards or norms that don't need to be explicit – the report will be written in English
- b) Specific standards, regulations or guidelines which apply to this situation – for example standard operating procedures, safety guidelines
- c) Specific standards and criteria applicable to this situation – the report must be at least 12 pages and address the following topics; the house inspection is to take particular account of the condition of the septic tank

#### d) The time by when the request is due

The specific details may or may not be open for discussion, depending on the situation. Once a customer's request is accepted, the implication is that if the conditions of satisfaction are met then they will be satisfied with the result. In addition effective leaders also look to ensure that the performer will also be satisfied – since dissatisfied performers don't make effective performers.

#### **Promises**

Promises to deliver on agreed and understood requests are for the performer to make, but the effective leader listens carefully not only to the words, but the body language and mood behind the words. Powerful customers will not accept a promise until they have a high level of trust that it can be delivered. They are committed to the ultimate success of the venture, not just getting to a 'Yes'.

#### **During the Action**

Effective customers don't just disappear and leave the performer to it. Even if the performer is very experienced and competent in the area, strong customers will look for a regular assessment of progress and assurance that everything is on track. Clearly the frequency of check-in will depend on the level of trust that exists and no performer likes to have a customer looking over their shoulder. However effective customers stay interested in progress and likelihood of a successful outcome.

However, life happens and needs or specifications will change or problems occur. Effective customers immediately communicate and negotiate any changes in their needs and work towards new promises. This isn't a license to make changes 'willy-nilly' but if there is a good, unforeseen reason then it is essential to address it straightaway.

Similarly performers experience problems that may have an impact on their ability to deliver as agreed. Effective customers stay current on problems and the actions being taken to resolve them - without shifting the responsibility back from the performer. After all, somewhere down the line the customer has their own customer for whom they are the performer and depends on successful delivery.

#### **Satisfaction**

Once the performer has finished work according to the agreed specification, it is incumbent on the customer to either express their satisfaction or, if some of the standards weren't met, dissatisfaction. Along with dissatisfaction comes a request to the performer as to what they are going to do to make things right. 'There are leaks in the new shower installation and I want to know what you intend to do correct the problem?'

### **Putting it all together**

All of us have our relative strengths and weaknesses as customers. For example, I used to be very indirect when making a request 'if it's not too much trouble . . . '. Since learning the traits of powerful customers, I now say something like 'I have a request for you, is this a good time?'

Here are some common missteps (based on the 'Linguistic Viruses' from Matthew Budd)

- 1) Initiating actions outside your area of authority or without involving all those impacted
- 2) Making requests which are not clear to the intended performer
- 3) Not watching the mood of your requests – for example making requests when angry, being sarcastic, etc
- 4) Not communicating your expectations, standards or assumptions
- 5) Not listening beyond the words to the promise that is really being made, to ensure that your needs are being met
- 6) Not accepting that the performer has valuable ideas and suggestions
- 7) Not understanding that the performer also has needs that need to be met in order to be successful
- 8) Not helping the performer succeed
- 9) Not giving feedback on your level of satisfaction or dissatisfaction

**In which situations are you a strong customer? What do you do that leads to success? What are your weaknesses as a customer? What impact do they have?**

**Based on the traits listed above, where would it be helpful for you to focus?**

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**Where might you practice to improve in those areas?**

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**What would the benefit be? How would you know if you were successful?**

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I would be delighted to follow up if you have any specific questions or situations you would like to discuss - or comments or ideas to share. You can contact me at:

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**References:**

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