Deliver a Practical Solution

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What does this tool do for you?

This tool helps you document the customer solution for future managers.

Having a well-documented customer solution helps ensure your project is completely properly. It then provides critical information for future managers and developers. In particular, it tells them **why** customers want it and **how** it needs to work for them over time.

When should you use this tool?

Use this tool at the end of a project to provide a guide for future managers.

What problem does it address?

It's common to see managers trying to improve the performance of a product or service with poor information.

This can happen when development project results are inadequately documented. There may be **too little** information, but just as often there is **too much**. This means future managers have to do unnecessary work to understand both customer and solution.

This tool helps you record vital information visually to provide a '**dashboard**' for future managers.

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What do you need to know?

About managers' questions

Any future audience of managers will have four key questions towards deciding on their strategy and activities.

1. **Who** specifically is the product or service for? Who are the target customer (buyer) and consumers (users)?

2. **Why** specifically do they want it? What specific outcomes do they desire from having it?

3. **How** specifically does it then need to work? What specific experiences do customers want from using it?

4. **What** specific touchpoints and other features does it then need? What does it need to do?

About the dashboard

Good answers provide the **right information** at the **right time** in ways that are **easy to use**.

A '**dashboard**' is a way of by organising the right information visually so it is easy to apply, update and evolve as customer desires, organisational capabilities and competitors evolve.

The end of a development project is the best time to do this because the information is fresh and a dashboard can be constructed quickly.

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What do you do?

❶ Develop a framework

Start by summarising your information in answer to the four key questions. The **first** diagram overleaf is an initial framework.

❸ Customise the framework

Customise this by making two lists:

- What needs more detail (or is missing)
- What questions need to be answered for future managers and developers

Then evolve the diagram to address these questions. Focus on the diagram itself (avoiding the details for now). The **second** diagram overleaf is a basic example of this.

❷ Detail the information

Now detail the information for each box in your evolved framework. Use a separate sheet for this. Keep the information succinct by using bullet points and 1 – 2 sentence explanations. Add performance targets, actual performance, and other details as needed.

❹ Finalise the information

Finish by finalising your diagram with the related detail. Use the diagram as a stand-alone visual summary and a guide to further information. Provide this content under headings matching the diagram.

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❶

Who is this for?

Summarise the customer in their context of use

❷

How does it need to work?

List touchpoints, each with its desired experiences

❸

Why do they want it?

List desired and avoided outcomes

❹

What does it need to do?

List the key capabilities (must and should have/do)

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1 Customer

Profile with est. numbers/ revenue

2 Context

Key trends & opportunities

3 Desired outcomes

Key outcomes with targets

4 Capabilities

Key features and advantages

5 Touchpoints

Key touchpoints with key desired customer experiences

6 Brand

Key brand personality, values and other attributes

7 Strategy

Key marketing & growth strategies

8 Performance

Key performance indicators to date

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How might you do it?

Working on each step

- Start each step by clarifying the task
- Finish each step by reviewing your work and creating a simple summary
- Record any related or new ideas elsewhere for other sessions
- Check your dashboard with managers to ensure it provides vital information in a succinct and organised way.

Give yourself time

Give your team a lots of time – say two to four hours – so they can brainstorm and then summarise results effectively.

Look ahead

Shape your diagram to include internal (targets, costs and sales) and external (customer research) information, and to make updates and changes easy.

Use high-level indicators of change. For example, use a base number (e.g. current revenue), with an up or down arrow or a positive or negative percent, to summarise the direction or size of change.

Leave the detail to other pages where managers can check anything that requires specific attention.

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What is an example of the results?

An NGO found the recent recession and changes in government policy affecting its membership and funding. It needed to cut costs significantly without reducing member benefits.

We held workshops with the NGO's staff and key members. We talked with them about their desired outcomes, experiences and the existing touchpoints.

We then re-organised its existing operations into four main services, each with its own activities and touchpoints. This helped re-focus the NGO's goals and strategy, and simplified interactions for staff and members.

Communicating changes is a major task, even more so in times of stress. So we developed a basic 'dashboard' the NGO could work through and evolve with its staff, board, members and partners.

As a result, the NGO is enjoying a new lease of life and steady growth at a time when these were least expected.

A gentle disclaimer

This example is based on work facilitated by Supplejack and outlines successful use of a tool. We want you to enjoy similar success.

We are thankful you've downloaded this tool. But we cannot take account of your specific needs, your context nor the ways you apply it. As a result, Supplejack cannot accept liability for your use of this tool or its effects.

We do recommend you use this tool with respect, competence and imagination. If you are unsure how it might best work, we suggest you hold a practice session with staff. You might also contract a professional facilitator or contact Supplejack directly.

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Please help us by providing feedback about this tool. You can do this by completing this brief, 6-question Survey (http://www.surveymonkey.com/s/Supplejack_Tools) or by contacting us directly.

Thanks for your interest!

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