Inform Customer

Pattern type:
- [ ] Phase pattern
- [ ] Stage pattern
- [x] Task pattern

Pattern classification:
- [x] Essential
- [ ] Recommended
- [ ] Supporting
- [ ] Optional

The purpose of this task is to provide an honest view of the progress to the customer, and to give the customer a possibility to give feedback about the implemented features and to guide the development.

Goal

The goal of the Inform Customer is to

1. Allow the customer to monitor the progress of the project, and
2. Ensure that the features under implementation are validated.

Entry criteria:

1. All the other tasks of Working Day are completed.

Inputs:

1. Descriptions of the tasks including related support material (if any), in a level of accuracy defined by the customer,
2. Descriptions of the possible problems, and
3. Descriptions of the possible miscellaneous issues.

Exit criteria:

1. The report contains all the elements described as inputs.
2. The report is sent to the customer(s)

Outputs:

1. The daily status report.
The following figure illustrates the steps in Inform Customer:

1. Compose a status report. A proper status report is created including all the necessary parts such as description of the existing problems and task statuses.
2. Send a status report. Composed report is sent to customer(s) and other interested stakeholders.

The following document templates and tools are used in Inform Customer:

Templates:

1. StatusReportTemplate.doc This template can be used in customer reporting if the communication medium is email.

Tools:

The following roles can be identified in executing Inform Customer:

1. **Project team/project manager** is responsible to report the customer about the state of the project. Project manager composes the status report and sends it to the customer after each Working Day.
2. **Customer** is obliged to review the reports and to give necessary feedback about the implemented features to the project team. It is also project manager’s duty to support the project team by answering all the questions that the team may present about the development issues.

The answers to the frequently asked questions will provide additional in-depth information for conducting Inform Customer. The information presented has been gained when applying the pattern in practice.

**Q** How long does it take to compose a daily status report for the customer?

**A** Normally it should take about 5-15 minutes. Because you will use reporting template, you do not need to think about the report structure every time.

**Q** We have not progressed at all during this day. Is there any reason to compose a status report?

**A** Yes, you should report why you have not progressed. If there is a problem you need to inform customer of that. Maybe the customer can even help your team to solve the problem.
Q We have analyzed and accepted the requirements with the customer and implemented them correspondingly and reported our progress. Still we find lots of defects during the Release Day. What’s wrong?

A Often the requirements are realized only when the customer sees the product in action. If you have analyzed the features properly, the reason can be that the level of reporting is inadequate. You are not reporting the customer in enough detail what you’ve done during each day. Because of that the customer cannot give you any feedback. Consider changing your reporting practice so that you can provide the customer more descriptive information about the product. You can for example send screenshots, ui-illustrations etc. graphical support material to the customer along with the more precise descriptions of the features.

Q We don’t get any feedback from the customer. Why?

A Have you established a mean for communication with the customer? Have you asked any specific questions from the customer? We have experienced that if you don’t ask any specific questions, you should not expect any response. However, if you do ask something and the customer doesn’t reply, that may be a sign of the lack of commitment from the customers’ side.

Q We found that the feature we are implementing requires clarification. We’re almost done for the day, so should we ask about the functionality in the status report or contact the customer as agreed for the problem situation?

A Contact the customer right away. You have established a communication channel for this kind of situations, so use it as you’ve agreed.

Related patterns

Other patterns which are part of, composed of or associated closely to the Inform Customer are identified here.

- Working Day: Inform Customer is part of Working Day
- Wrap-up: Inform Customer is associated with Wrap-up since the problems and progress is discussed during the Wrap-up session before

Variations

N/A

Risks

Possible risks which can result from Inform Customer as well as the solutions including pre-emptive actions for avoiding the risks and actions to take to minimize the risks’ effects are as follows:

- Daily status report is too generic/complex. The contents of status report may become either too generic or too complex. Solution: Some customers prefer simple reports and some other may require a bit more content. Customer(s) feedback is needed to guide the form of reporting to the right direction.

- The customer does not give any feedback and does not guide our work. Sometimes the customers do not want to have close collaboration with the team or they do not fully understand their responsibilities. Because of this the team might be left alone with the development. Solution: It must be emphasized to the customer that the communication goes both ways. The team is responsible for informing the customer about the progress (if agreed), and the customer is responsible for giving the necessary feedback to the development team.
Experiences of customer informing can be found from [1] and [2].
