



Delivering a superior customer experience in solutions delivery processes: Seven factors for success

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KEYWORDS

Ad hoc teams;
Business to business;
Customer experience;
Solutions delivery
teams;
Customer relationship

Abstract In marketing complex solutions to customers, business-to-business firms face significant challenges in managing the customer experience effectively in solutions delivery processes—due primarily to the use of ad hoc teams. To learn more about these challenges, we interviewed executives from a *Fortune* 100 high-technology company. We identify seven factors ad hoc teams can employ to address this problem, focusing on delivery team composition, delivery processes, and organization-level changes that can be made to optimize the success of the team. In solutions selling, the delivery phase is particularly critical to success. The factors identified enable firms to better manage the customer experience and enhance performance.

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1. Challenges in managing customer experience in the solutions delivery phase

There is an ongoing challenge for business-to-business firms working to deliver technically complex solutions to clients: How do we bring together the right group of people to provide a superior customer experience (Badrinarayanan & Arnett, 2008; Wollan,

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Quiring, & Schunck, 2015)? The way in which teams are formed, work together, and integrate activities to achieve goals is critical to performance (Birkinshaw, Toulan, & Arnold, 2001; Dailey, 1980; Montoya-Weiss, Massey, & Song, 2001). This poses particular challenges for ad hoc teams that may lack a shared history of working together. For team leaders responsible for bringing together the best-suited individuals for an ad hoc team, the challenge lies in leveraging the embedded knowledge of the team into a superior solution for the customer.

Managing the customer experience needs to be a priority across all interactions between a customer and provider (Lemon & Verhoef, 2016; Macdonald, Kleinaltenkamp, & Wilson, 2016), but it is especially crucial during the solutions delivery phase because of the extended engagement duration (Plouffe, Nelson, & Beuk, 2013). Depending on the complexity of the solution, the delivery phase can last several months.

Team composition for effective performance in the delivery phase can be especially taxing (see Hollenbeck, DeRue, & Guzzo, 2004; Moon & Armstrong, 1994; Williams, Parker, & Turner, 2010) and managing the solutions delivery phase can be complex because the teams that create and deliver customized solutions are often constituted ad hoc (Bushell, 2004; Steward, Walker, Hutt, & Kumar, 2010). Ad hoc teams are made up of experts with specific, complementary skills and knowledge who are mobilized to provide a specific solution to a particular customer. Unlike the sales process in which large or national accounts may have dedicated sales teams (Homburg, Workman, & Jensen, 2002; Ivens, Pardo, Niersbach, & Leischnig, 2016), solutions delivery teams are necessarily ad hoc in many instances; the solutions delivery process is typically a discrete event with a specific start and end date, making it financially impractical to have a permanent team dedicated to each client. Billing is an important element of the overall cost of delivering a complex solution. Each team member records the time devoted to a specific delivery process and the hours are billed to the customer. In addition—regardless of their ad hoc nature—as employees of the firm, members of the solutions delivery team play a vital role in consumer perceptions of brand equity (Gelb & Rangarajan, 2014).

In this study, we identify seven factors that can significantly enhance the likelihood of an ad hoc team delivering a successful outcome while providing a superior customer experience. These factors can be grouped into three categories: ad hoc team expertise, the staging of the solutions delivery process, and organizational facilitators. Essentially, each of these key factors involves human capital planning decisions at three levels—the team

composition, the solution-delivery process, and the organizational systems that are in place.

These factors, isolated through the in-depth examination of successful and less successful customer engagements in a large multinational technology firm, provide a basis for creating teams that have an enhanced probability of delivering a superior customer experience.

2. In-depth interviews

While we conducted multiple research studies on customer experience in the business-to-business (B2B) context, our key findings in this article are based on a single field study. The featured company is a *Fortune* 100 high-technology firm that offers a comprehensive line of information technology products and services to customers across industry sectors in the B2B market. The field study started with a series of roundtable discussions with executives charged with the sales and delivery of complex IT solutions for enterprise business customers, followed by an in-depth telephone interview with each of the 60 other executives and supervising managers. We interviewed managers who were directly responsible for assembling and supervising the ad hoc teams delivering solutions for various customer engagements. The executives were team leaders responsible for the deployment and coordination of the teams' members for the duration of the engagement.

While our findings are generalizable to other large services organizations, several limitations must be noted. The executives we interviewed would have been evaluated on a set of key performance indicators (KPIs), which may differ across firms. Furthermore, while in the services industry, the company is grounded in selling multifaceted IT solutions for enterprise business customers, thus the results may have limited implications for companies who sell relatively simple products/services—particularly in consumer markets. Our findings are most relevant to those B2B firms selling complex offerings to customers using ad hoc teams.

During the interviews, solutions delivery executives were asked to describe two recent customer engagements, one that they deemed successful and one perceived to be less successful. Successful engagements were described as providing a superior customer experience (as measured by levels of customer satisfaction), as well as better meeting firm/customer-specified deadlines and budget constraints. Customer satisfaction measurements remain one of the more commonly used metrics for assessing customer experience outcomes, despite the development of alternatives (Brakus, Schmitt, &

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