Haaga-Helia
University of Applied Sciences Ltd.

Customer expectation management in new business sales

Topi Reingoldt

Master’s thesis
Customership and sales
2022

Haaga-Helia
ammattikorkeakoulu Oy

Abstract
18.04.2022

Author(s) Topi Reingoldt	
Specialisation Customer relationships and sales	
Thesis title Customer expectation management in new business sales	**Number of pages + number of appendices** 57+6

In new business sales, guiding the customer experiences foremost tool is expectation management. Managing expectations gives a company the necessary power to form and guide the experience and turn a formerly reactive business element into a proactive tool.

Objective of the thesis is to create and test a measurable customer expectation management program, that could be evolved to cater for various, different personas. Research questions corner the subjects of best practices on how, when and in what order should the touch points of customer journey be managed to best facilitate the work of senior managers, to manage expectations. The program aims to prolong customership retention and increase customer satisfaction in the long run.

The thesis describes the employing company and its current situation and desires in customer expectation management.

Theoretical framework consists of expectation management, with minor elements bordering customer experience when necessary. Customer journey, its modeling, process mapping and creating touch points is also studied in the framework.

The thesis is an action research, a research into expectation management utilizing multiple methods. Main methods of action research in this thesis are semi-structured interviews, process mapping and coaching. The study is qualitative. Data is gathered from structured feedback before and after the implementation of the expectation management program.

Implementing the program is started by coaching the program to the implementing Senior Manager. The senior manager implements the recommended actions and gathers notions and feedback and reports these. Feedback is read repeatedly to recognize recurring elements and to test a proposed explanation on how to enhance expectation management.

The thesis results in a standardized expectation management program that forms an operating standard for the company in managing customer expectations

Keywords
Expectation, management, sales, customer relations

Contents

Abbreviations

CEO: Chief executive officer

HH: Haaga-Helia university of applied sciences

HRM: Human Resources Management

NBO: New Business Office, the projects focal employing company

NBS: New Business Sales is the selling process of the following service: suspecting, prospecting, and contacting interesting corporations for, and often under the name of, the customer company, in order to create sales opportunities before passing the information to the employing company

NPS: Net Promoter Score

1 Introduction to thesis

This master's thesis is an action research, a case study in customer expectation management. The focal company is New Business Office in Helsinki, offering consultative services in sales and customership management.

This case study researches how customer expectations are born and managed, what are their pain points and what can and should be done in order to attain company's set goals. Theoretical framework is built to formulate understanding of expectation management, which is mirrored to the company's current situation and goals. Current situation is coded to recognize possibilities in expectation management. Customer journey maps and touchpoints are studied and documented into the theoretical framework, to help facilitate further action plans. An expectation management specific process map is built from interviews inside the company. Proposition is tested by building an action plan into the expectation management process map, in the form of actionable touch points and coaching this to the implementing senior manager. A proposition is formulated, that since nothing specific is decisively done to manage expectations, any measurable and clearly communicated action will yield positive results and clarify customers implicit expectations. Impact of the touch points are documented, coded, and analyzed. Results and recommendations are given accordingly.

Customer expectation management in this thesis covers creating, guiding, avoiding, meeting, fulfilling and surpassing customer expectations, and their management when acting as a consultant team-leader.

1.1 Objective of the thesis

The main objective of this thesis is to create a measurable customer expectation management program and recognize possible touchpoints in the customer journey to identify and affect customer expectations. The objective also aims to identify best easily available procedures, channels, personnel, and data to leverage these touchpoints to a company beneficial target. As a simpler statement, the objective is to create a measurable customer expectation management program, that could later be developed further.

Customer expectation management was initially considered for a thesis project when completing the HH course: Current trends in customership and sales. The coursework produced a customer journey canvas detailing the initial partnership cycle and detailed touchpoints in it. The canvas revealed multiple possible touchpoints, where added value can be created, or critical negative feelings avoided if the customers' expectations can be managed. Also because of re-structuring the organization, and a pre-made decision to create a role to manage customer expectations alongside own work, it was seen beneficial to have a thesis study to accelerate the creation of a customer expectation management role. Customer expectation management in this thesis should be considered part of customer experience management, as it focuses on setting up the experience, therefore taking stronger control of forming the experience, rather than managing the experience itself.

Customer expectation management aims to solve issues of customer retention and satisfaction levels for NBO in the long timeframe, by building the initial model for future evolution and adaptation of processes directed to ensure customer satisfaction. Customer satisfaction in itself interests NBO as a self-serving value, ensuring customer retention and forwarding of the sales pipeline, as suspicious feelings towards the initial partnership's benefits are dismissed. Customer expectation management also helps in upselling services, as pre-earned satisfaction and trust is usually necessary for such action. The thesis also accelerates the learning of the team leader supervising the thesis inside NBO. Self-actualizing benefits for the thesis worker include deeper understanding of organizational processes, sales and customership management processes, and further bottom-to-top support of team leader and wider understanding of customer needs in general. Academically the benefits in a broader scale include a comparable model of customer expectation management for further studies and comparison and may or may not include new data and information for the reader.

1.2 Research questions

Main research question is how to create, guide, avoid, meet, fulfill, and surpass customer expectations when working as a consultant team-leader, when the aim is to create higher customer satisfaction and retention, alongside own work. The thesis aims to give recommendations in all process situations where they are most suitable or avoidable.

Sub-question 1 is what are the optimal channels, situations, volume, and contents of contact to create more value in customer expectation management. The thesis aims to answer this sub-question with recommended channels in different touchpoints in the customer management process and how to benefit optimally from those touchpoints.

Sub-question 2 is what kind of support, coaching and guidance from higher management, and data from supporting members is necessary and beneficial for customer expectation manager. The thesis aims to answer this question through interviews and check-ups throughout the process, to ensure available information is accessible. Sub-question 2 has possibilities of evolving other roles inside the company and bring forward advanced data collection models.

1.3 Defining the thesis and case company, and their limitations

The thesis focuses on customer expectation, not experience, management. Experience may be measured to reflect the effect expectation management has on it, but this should be the only foreseen exception. The start of the research of the thesis includes desired effect-interview of the NBO CEO, description and analysis of the current tasks taken to manage customer expectations and evaluation of inhouse skill to manage said tasks. According to the forementioned items, an effectuation plan is formed in the form of a process map with actionable touchpoints focusing on customer expectation management, evaluated by criteria seen as beneficial for NBO. For the implementation of the effectuation plan, a one or more coaching sessions are held, and check-ups had. By the end of the thesis work, an evaluation of success is done. The evaluation is done to help validate continued processes inside NBO, and provides minimal benefit at this point, due to this being the first cycle of development. For improved evaluation and validation, the process should be validated with customers over an extended time.

The thesis does not include a best practices-style playbook of possibilities for customer expectation management, because this is a single process that is being advanced. The thesis also does not consider varying subtleties of different customer profiles, as the initial goal is to define and create a universal baseline process for customer expectation management. The thesis does not consider how customer expectation management affects the acting managers other work in experience managing.

1.4 Definitions

Customer expectation management is the planned process of setting up customers' expectations, so that they are correlated with company's intended delivery. The overall idea in managing expectation in business, is to make customers happy, have long partnerships with them and create positive referrals for future expansions. Expectation management happens across the providing company, so intentions and abilities to deliver should be communicated and be clear internally, so that the customer will not be confused at any time. For example, customer expectation management can be used to set expectations lower, to later deliver outstanding results and create a greater customer experience, or it could be used to give an uncertain project more time to be finished. (Ojasalo 2001, 200-201, 206, 210.)

Customer experience is the feeling a customer has, after the total of company actions performed, that affect the end customer. The total includes all actions and responses by customer, non-obvious interactions by back-office employees and actions, that non-directly affect how customer-facing employees act and behave. To manage customer experience, a company must set or recognize customer expectations and decide how these can be modified, by whom and at what points. Customer experience is born instantly when an experience happens, but changeable and manageable over time. Customer experience is a large factor in marketing, customer retention, loyalty to brand and therefore overall value of a company. Four major components of customer experience are how a company delivers their product or service, providing easy access to service, customer service and how a company listens and learns from their customers. All these major parts can be broken down to multiple front- and back-office functions affecting the whole experience through expectations. (Goodman 2014.)

Customer Journey is the refined and charted collection of touchpoints and actions a customer takes with a company. A customer journey describes where, when and how a customer acts. Additional information, like customer moods, important factors and affecting outliers can also be noted on a customer journey. A customer journey is usually segmented into pre-purchase, purchase, and post-purchase segments. Customer journey mapping and analysis is used to better affect parts and whole of the journey, therefore shaping the customer experience. Understanding customer journeys develops company’s ability to blueprint their services, improve satisfaction and throughput of efforts. Customer journeys can provide management with multichannel understanding and improve overall communication and teamwork of a company. (Lemon & Verhoef 2016.)

2 Expectation management

This segment defines expectation in business and compares it to experience to outline what is being managed and considers what implications expectation management has for businesses. The content here is used to model the process of customer expectation management in different touchpoints of the customer journey map.

Experience is born from confronting expectations. Without expectations, what is now understood as experience, would simply be acknowledging or learning. Expectations allow for feelings of relaxation and control over situation that are happening or about to happen. As experiences are gained, expectations change accordingly. (Sherman 2019.)

When customers are dissatisfied, the problem is usually found to be in wrongly placed expectation. Communicating what should be expected is key to unlocking customer satisfaction and dispersing wrongful expectations through altering the expectations of customers. Other possible ways of taking action through expectations are accommodating the expectations or abandoning the customer. (Sheth 1996.)

Ojasalo (2001, 203) suggests that when expectations are more realistic, customer experience will be better in the long run. When customer expectations need to be changed, positive results usually stem from either lowering expectations are upgrading the delivery.

Setting expectations to an achievable level may result in short term dissatisfaction when a customer is shown their initial expectations cannot be met in a way, they thought them to be. However, when expectations and their necessities are laid out, long term satisfaction is usually achieved by achieving set goals in a manner that was planned beforehand. (Ojasalo 2001, 203-205.)

Three distinctive types of identified expectations customers can have that should be corrected are fuzzy, implicit, and unrealistic expectations. These types of expectations can lead customers to have negative feelings, even when they cannot identify why these negative feelings are experienced. In the interest of good business these types of expectations should be tried to be reversed to their counterparts, precise, explicit, and realistic expectations. The three types can exist simultaneously regarding one or multiple expectation. (Ojasalo 2001, 201-202.)

Fuzzy expectations are expectations that are not clearly formed or constructed. When a customer has a fuzzy expectation, they know that something has to change, but have not defined why the change is necessary or how it should be done. With fuzzy expectations, customers who are unhappy with delivery cannot tell why they are unhappy, they just feel it. Fuzzy expectations should be turned into precise ones, where customers know what they need, and what to expect from a provider. Fuzzy expectations are transformed into precise ones through dialogue between a customer and a provider. Through dialogue customers and providers can pinpoint the exact problem to be solved and how it can be resolved. This practice either focuses fuzzy expectations into precise ones, or at least less fuzzy ones. With more precise expectations, the customer experiences less frustration and is less likely to change a provider or experiences more happiness with the service. (Ojasalo 2001, 204-207.)

Unrealistic expectations are expectations that no one can fulfill. Customers can have unrealistic expectations towards what is delivered, how the delivery happens or the whole of delivery. Unrealistic expectations should be turned into realistic ones by calibrating them through dialogue. Usually, unrealistic expectations can be calibrated by defining the problem and what could be the solution. Once the solution is defined, the delivery of the solution should also be defined to reveal any obstacles or pain points in delivery. When problems solutions and delivery are defined, their desired effect should be agreed upon, to see if the train of thought concerning the whole is realistic. Calibrating unrealistic expectations can cause negative feelings for customers, when they realize that their desires will not be met in a fashion, they thought they could have. Calibrating unrealistic expectations to realistic ones however often leads to a more permanent customership and greater customer satisfaction in the long run. It is possible that customers devote time for dialogue with a provider, and are not happy with the results, which leads to unhappiness at all stages with the provider. It is advisable for providers to consider customerships with customers who have totally unrealistic expectations. (Ojasalo 2001, 205-206.)

Implicit expectations happen at a level that most people do not even think about. Implicit expectations usually come up only when they are not met, and frustration is born from unmet expectations. Implicit expectations can concern the whole or parts of delivery. Implicit expectations can be born from previous experiences with the same or similar provider, and when the expected does not happen, frustration is born. Implicit expectations can be clearly communicated if they can be made to surface some way. Unfortunately, implicit expectations become explicit usually through a negative experience. Expectations can start off as explicit but become implicit during a customership, and then reveal themselves when the change of delivery happens. Implicit expectations should be made explicit by revealing them. Revealing implicit expectations happens through dialogue with the customer, by discussing the whole of the problem and solution. Revealing implicit expectations can create short-term frustration for the customer, since it takes their time and effort, but this usually comes with a greater satisfaction in the ling run. (Ojasalo 2001, 203-205.)

Managing expectations should be a controlled and planned effort, in the pursuit of long-term customer success, retention and happiness. Success in expectation management should be measured in both short- and long-term since they affect each other. Short-term success is not always necessary for long-term happiness, so in a controversial situation, long-term effects should be preferred. Customer expectations should never be set too low or high, but on an optimal level for the provider to make a positive impact. (Ojasalo 2001, 210.)

2.1 Expectations in business

Customer expectation management can be seen as the planned process of setting up customers' expectations, so that they are correlated with company's intended delivery. The overall idea in managing expectation in business, is to make customers happy, have long partnerships with them and create positive referrals for future expansions. Expectation management happens across the providing company, so intentions and abilities to deliver should be communicated and be clear internally, so that the customer will not be confused at any time. For example, customer expectation management can be used to set expectations lower, to later deliver outstanding results and create a greater customer experience, or it could be used to give an uncertain project more time to be finished. (Decker 2018.)

Rising quality, positive impact and personal expression are the three main driving factors affecting customer expectations today. Customers expect services and products to elevate in quality constantly and are able to easily compare them by modern methods. Positive impact does not necessarily mean changing by actively doing something, but usually removing the elements of quilt underlying consuming a service or product. Personal expression is tied to the notion that customers expect to feel that the asset is made specifically for them, that this is the best available option for exactly that individual. Customers do not even need to personally experience the best option, but expect to be able to have it, through knowing it exists through available media. (Mason, Mattin, Luthy & Dumitrescu, 2015.)

Rising quality is now understood as a constant. Information is widely available, with professional documentation, user reviews, cross referencing etc. Every product and service is constantly compared against its competitors and expected to perform better in a never-ending cycle, in order to stay at the top, or be forgotten as only the second or third best option. This expectation to stay on top is what forces companies to evolve and compete. Another driver for rising quality is disruption of products and services. While it is understood that more is not necessarily better, more options to choose from means more features should be available from top producers. Innovation in a completely other field could be implemented by a competitor, and after that, customers will expect that innovation to be delivered by everyone. Innovation and disruption are even celebrated, anticipated, and popularized, in order to bring forth change in the world faster than ever. Multiple platforms help crowdfund even the most alien ideas with low risk to the innovators. These innovations in turn are discussed and compared in multiple forums, speeding up the cycle of improvement, leading to more expectations from customers. Expectation here is born from the feeling that somebody wants to improve over others, and there are multiple ways to easily do that. When enough people expect something, it makes the expectation true. (Mason et al. 2015.)

Quilt-free consumerism, or positive impact expectation, is the idea that using a product or service will not cause harm, or if possible, will improve a morally or ethically important factor. Expectation here is born from the widely adopted understanding, that resources are limited for the planet. Consumerism will not cease, since customers will try to look for new and improved things, so the problem here is shifted to providers. Positive impact thinking leads quickly to other fields, like expecting the services to cause minimal harm and grief, translating into feeling of ease-of-use and not having to think about consequences of taken actions. Expecting something to be ethically better drives common change here into the direction of easier to use products and services, that can communicate their value. This feeling directly translates into better feeling of self and increases experienced value. (Mason et al. 2015.)

Personal expression in society today is seen as a standard value to be sought for. People do not want to be a part of a corporate, they want to identify through personalized products and services, that are implications of who they are. The expectation that somebody will provide the desired item, drives companies to compete on who can do it best. Best here means being in a way so that personalization can be made profitable and easy yet felt like unique to the customer. It is expected that personalized is better than bulk, and so personalized is now becoming the trend, rather than the premium. Personalized feels like more value for the customer, and when one or two companies start this, it is expected from everyone that is trying to survive. (Mason et al. 2015.)

According to Mason et al. (2015) expectation follows a cyclical model.

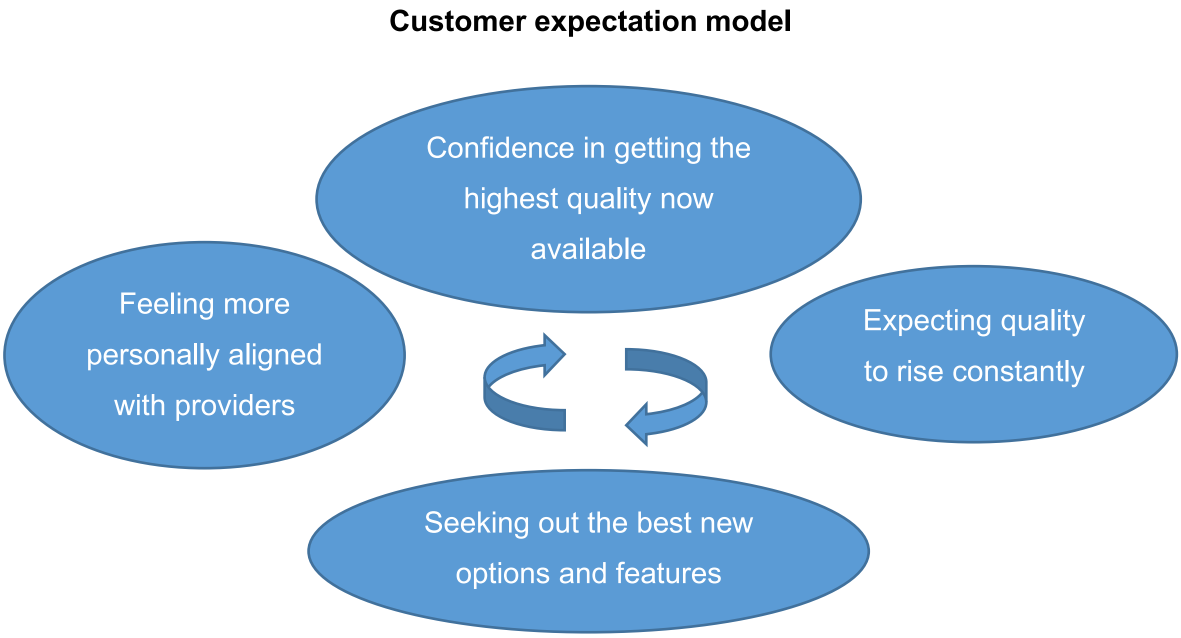

Figure 1. The Customer expectation model (adapted from Mason et al. 2015.)

2.2 Managing expectations

Expectation management can be summed up to the process of understanding what others believe will be the result of your service, matching it with a probable reality and facilitation the necessary process so that the end results match the beliefs and explaining the lacking elements. What makes Customer expectation management truly difficult, is that customer expectation is managed through multiple parties, often working cross-functionally. On top of all two-way communication is the factor, that previous experiences shape the expectations of customers. (Laba 2020; Basett 2020; Starak 2021.)

Managing expectations is important for businesses, because customers already believe that their needs and want should be validated or disproved. If the need for a solution becomes high enough, a solution will be sought for, therefore starting a seeking of provider. Understanding the factors behind customer needs makes understanding expectations easier, but not easy. Needs are born from the difference in past experiences and current needs or future desires. Understanding company's offering inside this solution cycle can greatly help in recognizing what true changes can be brought forth, but not what the customer really expects. Expecting to know what the other party expects rarely works for sustained business. If an offering or process is built on guessing, that may actually equal building future roadblocks for customer satisfaction. Clear and honest two-way communication should be the basis of expectation management. Saying no or denying some aspects the customer asks for is also a positive act in expectation management for future satisfaction. Promising to deliver and denying it later builds dissatisfaction, even if it enables initial action. Communication other options for customer needs that are not currently solved by a company's offering does not provide the highest positive expectation, but the most realistic one. Optimally in customer expectation management, needs, offering and possible solutions are aligned, involved parties and their responsibilities detailed and clearly communicated, and desired outcomes laid out. (Laba 2020.)

Effective customer expectation management requires all parties to be up to date constantly. Not on an hourly basis, but on a clearly stated project basis. Project workers need to know what is expected of them, when and how. Customers should be made able to understand what they can expect, and what is expected of them, for the providers of service or product to keep delivering. Expectations should be stated on a factual level, describing actual actions to be taken, and not just state that project workers are expected to deliver a sufficient amount of success, for example. Customers likewise should know, what circumstances require them to resolve a situation, and how. When communicating, it is sometimes necessary to remind everyone to what goals are the participants working to attain and how, so expectations do not take a side-track and advancement or delays are understood. It is also important to communicate what and when is being achieved. For example, if there are great differences in results inside different timeframes, or delivery is sometimes only partial. As services and products advance, dissatisfaction could rise from unsteady delivery, if it not factored into the initial discussions. Even communicating clear delivery aspects is not enough, when there is the possibility of people not reading the documents or can still interpret them as they like, this is why continued measuring and constant dialogue is necessary. (Bassett 2020; Starak 2021.)

According to Sheth (1996) possible avenues of managing customer expectations are shown here.

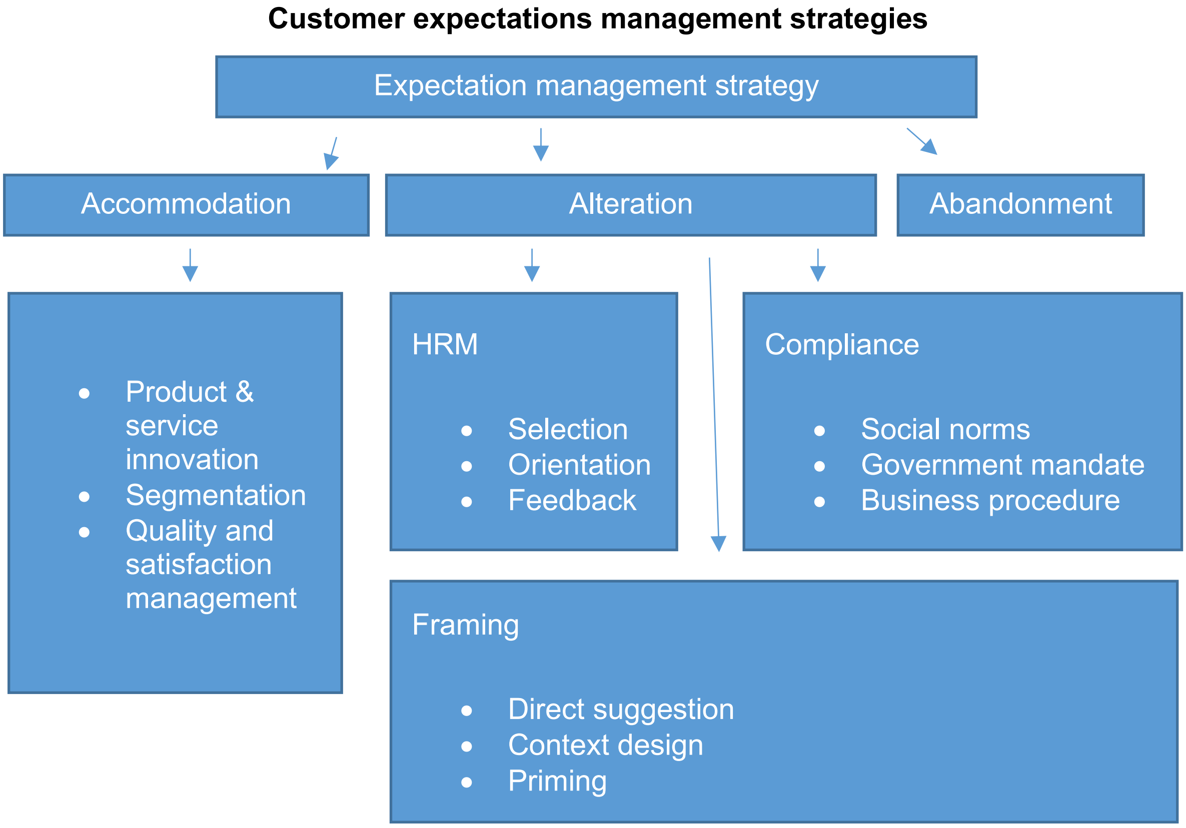

Figure 2. Customer expectation management strategies model (adapted from Sheth 1996.)

Accommodating customer expectations can take multiple forms. Product and service design, segmentation of customers and what is offered to them and quality and satisfaction management initiatives and programs, each sub-segment offers tools and tricks, but comes with a price. Products and services, when evolved, set new expectations that must be communicated and met. Segmentation of products and services may not be an option because of laws or other issues, and different segments will have altered expectations to meet, so a new set of expectations is born again. Quality and satisfaction programs are a standard practice aimed to elevate satisfaction. However, as quality and satisfaction are enhanced, the added effort brings costs that need to be calculated in and acted upon. These programs are a viable option, but as they are not cost-effective, they need to be carefully considered before utilizations. In a nutshell, accommodating customer expectations is a cost efficiency game, the input should never be greater than the output. (Sheth 1996.)

According to Sheth (1996) altering customer expectations, can take the form of human resources management, framing the expectations or managing compliance of customers.

Sheth (1996) suggests that customer expectations can be managed in a similar manner to employee performance. Through communications and marketing, preferrable customers with expected expectations can be attracted. Customer performance, like amount of currency spent or times a service is bought can be commentated upon and rewarded. By instructing directly or subtly on how to use the provided services and products in a corrects manner, desired experience is formed through managing the expectations, and the penalties if used wrongly are laid out. HRM measures are directed towards customers in order to select the ones with correct expectations and reform their expectations by making sure they understand what is being provided and how they are to use the products and services. HRM measures often take the form of justified communications, instructions, rewards and penalties.

Compliance management sets customer expectations by forming rules, forcing, or guiding customers to act in a way that is judged optimal for their experience. Different compliance management styles are governmental mandates, social norms, and business procedures. Governmental norms are not something a business can decide, but when beneficial can be communicated. Social norms are variable and shifting by nature, but moldable on a grand scale, for example through marketing, to effectuate what is acceptable in the business norms and premises. Business procedure can mean a business or company specific standard or practice. Business procedure can be used to self-justify why a company acts in a way it does. (Sheth 1996.)

Framing in customer expectation management means directly or indirectly setting reference points to the customer, which guide their expectation regarding the upcoming or continued experience. Three usual ways of framing are a direct suggestion, content design and priming. (Sheth 1996.)

By directly suggesting something to a customer, a business can let them know what is to be expected. Letting a customer know that they will have a certain role when doing business, lets them expect that issues that only they can solve will be faced at some points. Direct suggestion on what a customer should expect greatly helps in shaping the experience, by letting customer anticipate an outcome or an action point to be faced. (Sheth 1996.)

Context design sets expectations, by allowing the customer to reference other elements of the business to actual events and touchpoints of the business. Concept design can take the form of designing the physical premises, handed out materials, or business practices of the company, so that they are in line with the quality and form of the eventual delivered products or service. (Sheth 1996.)

Priming a customer for an expectation is a way of setting the expectation. Framing happens all the time, intentional or not, so businesses should consider when to priming the expectation is beneficial or not. Priming happens just before receiving the expected item, for example, the design of package primes the customer for the item they will receive. (Sheth 1996.)

Continuous customer expectation management does not mean presenting the facts in a favorable manner according to customers stated expectations or needs, but listening to weak signals and customer communication, and adapting operations and communication accordingly. Documenting and measuring every possible aspect gives solid ground to future argumentation and presentation on what should have been expected. Expectations are usually divided into stated and unstated expectations. Stated expectations are often included in service level agreements and other business critical documentation. Important expectation and therefore experience-affecting information is often left unstated. This leaves customers to set their own expectations, thereby setting stage for their own experience. External stakeholders need to understand the process and work of a team, at least on a satisfactory level, to understand what is being delivered, when and how. This understanding greatly benefits a company that has promised to do something, so customers are not unsatisfied in some respects. (Laba 2020; Bassett 2020.)

Even if a problem is solved and outcome is positive, the experience can be net negative due to lack of communicating the expectations. Experience management corresponds to overall expectations and outcome of solution and the total feeling of it, the how it was done and what was achieved for future. Expectation management corresponds to what and why was done to achieve the experience and solution. Solving a problem or need is not the issue, but what and why was done is what expectation management is about. This is revealed to many only when delivery finally happens, and it is too late to manage customer expectations. Communication is the key element when managing experience through expectations, so listening, interpretating and identifying solutions, and communicating them clearly is the main element. (Wu & Buyya 2015.)

According to Wu & Buyya (2015) the customer expectation management steps to avoid negative experience are:

- State problems and goals clearly to all participants at all times
- Determine and communicate measurement criteria
- Never promise too much
- Confirm success and eliminate wrong perceptions in a continuous manner
- Keep all partied informed to avoid self-made expectations
- Keep track of new expectations and measure them, or explain why they can't be achieved
- When facing criticism, concentrate on facts of action, not results

Customer expectation management is used both to avoid obstacles and to create added value. Delivering unique value or such different level of service, creates the opportunity to create customer retention and satisfaction on a previously unexperienced level. Before the customer even meets a company, they will have a preconceived expectation of them, this is the point where expectation management starts, when a company can state what can be expected from them. When this stated expectation exceeds the preconceived one, high level of interest is created. Stating a possible roadmap of delivery and success and what it takes is a good way to continue the discussion, as it takes the previous expectations deeper and communicates possible value the customer has not expected or experienced before. Expecting people to understand what will happen next is a mistake, since this can go either way, when you do not know what they expect. After this point, feedback is used for customer expectation management. Metrics should be set and agreed upon, so misaligned understandings and expectations can easily be corrected and proven through documentation. This feedback most often states differences between promises, actual delivery and interpretation of it. It is important to state multiple possible outcomes and the roadmap to them. It is also good to differentiate between a common understanding, and the feedback of just one person. (Starak 2021.)

When a customership is continued, reinforcement and adjustment of expectations is in order. Changes in any operation or metric need to be clearly discussed, stated and documented. Satisfaction on what has been achieved is quickly forgotten when time advances. Scheduled, clear and fair goals should be set, and any changing expectation addresses. The key question is, have the expectations of stakeholders changed, are they being met and is this the way everyone agreed to operate. When more is expected, it can be fairly stated that this was not the initial agreement, and adjustments made. Expectation management in all its possibilities is still a process of understanding enough and communicating clearly with customers. (Bassett 2020; Starak 2021.)

3 Customer Journeys and touchpoints

In this chapter customer journey mapping is studied. The customer journey map visualizes the process in which expectations are formed relative to each other, which should facilitate the recognition of what to manage, when and how. Touchpoints, their forming, and management are explained to understand the value-creating mechanism in them. Understanding of customer journeys and touchpoints is later used to construct the customer expectation management program.

3.1 Customer journey map

Customer journey mapping is a tool that emerged from customer experience management studies. Customer journey mapping is a strategic tool to visualize the touchpoints in a customer journey and can be derived from a company's service blueprint. Touchpoints are the steps that customers must or might take when using products or service of companies. The touchpoints make up a map of the customer journey, which helps visualize, organize, and manage the experience. Journey maps are relevant to companies trying to manage the loyalty, behavior and experience of customers and to improve their own processes and identify key elements in it. The journey as a whole is more meaningful to the customer experience than individual touchpoints, but touchpoints are usually managed separately. A typical customer journey map is constructed as a timeline and can be separated into compartments, for experience pre-, during, and post-service with different touchpoints allocated to their respective compartments. The touchpoints act as headlines, under which additional information, like customer expectation, past behavior, risk, possibility, action points, desired outcome and operating staff members can be added. Touchpoints should be decided according to company needs and the reason the customer journey map is constructed. (Kalbach 2018; Villani 2018.)

As companies and people working in them go through their daily tasks, over time they can forget that customers are not statistics and should not be treated as such. Customer journey mapping, discussion over them and analysis on humane factors of what the company does enables front-end working operators to deliver customer-centric service. customer journey map should be available and presented to everyone working in or for a company to maximize and streamline the overall understanding of company processes and functions through customer journey map generated insight. By measuring the touchpoints with relevant statistics over time, a company can more easily stay relevant and competitive in its field. (Temkin 2010.)

Customer journey mapping is a creation process that processes constructively. Customer journey map is constructed from a customer's point of view, and company specific touchpoints and data on them is added. Customer journey map is not all about data and action points but leverages them to help companies review their process and succeed and exceed the customer expectations. This review through customer viewpoint can help multi-functioning companies streamline their entire process. All customer journey maps should include the timeline of the map, persona-analysis of the customer, emotional experience of the customer, touchpoint of the company and mode of contact. Customer journey maps can also include contributing personas, not necessarily the operators of a company, and moments of truth, the points where a critical action must or can be taken. (Grocki 2014.)

It is beneficial to remember that customers engaging with a company are not aware of inner workings, limitations, processes, and ongoing operations inside the company. What is happening inside the company does affect the customer experience on some level or other, so even back-office operations should be considered when evolving the customer experience. Back-office however is not the focus of a customer journey map, but the actual feeling invoking touchpoints that make up the experience as a whole. Back-office can come up, when considering improved efforts or pain points in the service process caused by back-office action. Customers are the focal point of a customer journey map, so even when they are not aware of inner workings, the only truly insightful customer journey maps are constructed according to customer experience and expectations of the customer journey maps, and not what the company thinks customers expect from them. (Villani 2018.)

As different operators work different tasks inside the company, they can frame their work to serve a selected persona. Personas should not be stereotypes but constructed from valid data. Personas are usually constructed to identify groups of people, for the benefit of different operators and segments of a company to focus on from different points of view. To really create a feeling of identifying the persona, humane data like name, profiling images, quotes and description should be documented alongside contextual data, statistics, and demographic information. (Hormess, Lawrence, Schneider & Stickdorn 2018.)

According to Grocki (2014) the steps to creating a customer journey map are as follows:

Customer journey map creation

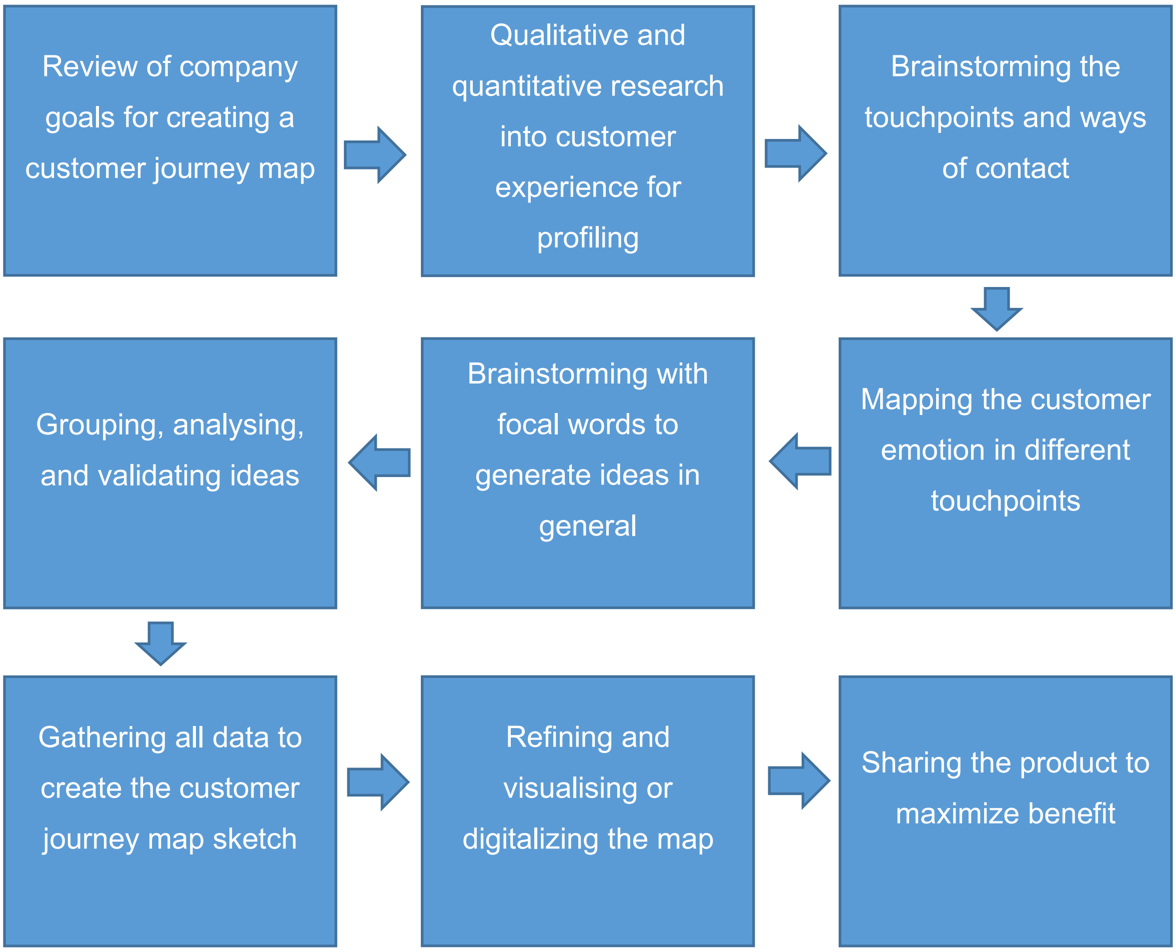

Figure 3. Customer Journey map creation (adapted from Grocki 2014.)

According to Villani (2018) a customer journey map can include the following information:

- Touchpoint name and description
- Name of the persona, preferably a persona card
- The description why the touchpoint exists, and customer faces it
- What action does the touchpoint require
- Is this a company or outsider touchpoint, if an outsider, the who is it
- Transition points between touchpoints and what does it mean for company and customer
- Customer feeling about the touchpoints
- Moment of truth, a highly affecting touchpoint, positive or negative
- Pain point, what are the customers fears on the touchpoint and how to deal with them
- Delight point, a touchpoint where customer problems and fears are resolved
- What metrics are used to measure the touchpoints, metrics can vary
- Customer journey map timeline

3.2 Touchpoints

Touchpoints are the points in a customer journey, where company interacts with the customer. Innovative management of touchpoints can yield fantastic results and create sought after service. After the customer journey has been mapped, touchpoints can be analyzed and affected. Different types of touchpoints can be products and services that are in use, one- or two-way communication, or seeing the product or service in use in a certain setting. Managing these different touchpoints to create a unified and controlled experience is important to control how your brand, products and services are seen. It is not enough to control just an aspect of the customer journey, but all touchpoints should be considered, and how they affect each other. Multiple touchpoints can be in play at any given time, and not always in a setting the provider controls. Managing the experience throughout the company functions and processes is a lot of work, but often yields results both in the customer experience and improvement of processes. (Richardson 2010b.)

Touchpoints do not always require the company to do something. Some touchpoints are encountered when the customer triggers them in some way or can happen unknown to the company. Understanding these touchpoints that trigger an experience can give a level of control over them. Outsider touchpoints can include comparison of products and services unknown to the provider and word-of-mouth. Triggering effects on touchpoints are need, want or feeling something. Touchpoints that are already encountered should provide an incentive to move on in the customer journey map to the next touchpoint by creating more need, wanting or a feeling of desire. Knowing what the customer has previously experienced helps facilitate better service. Non-touchpoints that affect the customer experience, beside 3rd party participation like self-comparison of services, can include transitions, the periods of time that customers have expectations towards the company. Transitions can include change of channel, change in communications, waiting on delivery, and waiting on payment or invoice. (Richardson 2010a; Villani 2018.)

When creating touchpoints for the customer journey map, Richardson (2010a; 2010b) suggests considering the following:

- What is happening exactly in a touchpoint
- How does the touchpoint affect the customer, and is it the same for all customers
- What needs and questions do the customers have at this stage
- Is there something left unsolved for the customer at this point
- Is the action in this touchpoint in line with the way other touchpoint are handled
- Can there exist a hardship between touchpoint that lessens the experience of a prospect or a customer
- Are these touchpoints unique for the company, or similar with the competition
- What are the customers doing themselves in order to advance on the customer journey map

- Why should the customer move to the next stage of the map and what are their motivations and emotions
    - What is preventing the customer from moving forwards

3.3 Modelling touchpoints

A successful modern business is still centered around people working for them, and the ability to benefit from their performance. As businesses evolve with times, so must the administrative and managerial action in them. Managing performance is fading away and giving space to enablement and empowerment. Managing performance hints at controlling, which in turns can hinder the performance of operators. Enabling and empowering operators frees up managerial time, generates sustainable and evolving internal processes to find out how different methods of engagement work, and develops commitment from staff members by making them responsible for their own actions. Guidance and empowering are still managerial duties, but the focus has shifted. The new focus on administrative level should be, what factors truly bring customer value and how they are measured. On managerial level the question becomes, how to best guide and empower staff to perform their best according to administrative targets. (Green 2017.)

Usually employees, products or services or a fulfillment of order is not singularly the reason why customer experience suffers. Often the customer experience is managed so poorly and not integrated into company strategy that companies fail to live up to their maximum potential. Customer expectations are often harder to understand than one would initially think, and if a company does not actively measure their success, there is no way of knowing what the experience of customers is honestly like. Simple expectations include that the solution has no surprises, it is easily available from the start, there is evidence that it works, and the company shows that they care about the customer. These umbrella terms become immediately much harder to fulfill, when parts of a process are inspected with this focus to ensure that they fill their part in the process. (Goodman 2014.)

Creating value for the customer starts with creating a buying vision. Buying vision creation means validating that customer are truly interested in changing the way they operate, that they are willing to spend resources on this change and that this is an urgent matter to drive the business further. Buying vision building also includes understanding the fact that this stated change requires an outside operator. Most decision makers decide to embark on a customer journey with a company that ensures and establishes a buying vision for them, rather than just offering themselves up for competition. Establishing a buying vision for the customer makes them understand and appreciate the benefits of changing the way they have operated, in order to create unique value. When a buying vision through value is created, new targets can be set for and with the customer, and personal strengths leveraged into the offering, and the initial feeling of value is created. (Geoffrion, Peterson, Riesterer & Smith 2015.)

Creating and developing value for the customer requires identifying the right person and how they act. These situations can be numerous and changing. By interaction, a value creator establishes the level of business they operate, and their conversational partners can direct or involve the correct decision makers for the process. This pattern of interaction can carry through multiple engagements and the people in the process may change, while the overall process keeps moving forwards with the organizations with the goal of creating better products and services for the customers and more profit for the companies. Understanding company structures and hierarchies, and how external factors are affecting the whole helps drive value into these conversations and take away buyer fears. Creating enough value in the conversations takes a company one step closer into closing a sale with real value. Company initiatives are great possibilities to offer valuable solutions, since initiatives come from inside the buying company, it is then more a matter of solving their issue in a truly value creating way. Financial value is certainly a matter in the conversations with customers, but usually when dealing in a high enough level a budget can be made if the feeling of value is high enough. (Geoffrion et al. 2015.)

Since value is a feeling and feelings vary, value can vary and be shaped. Sustained business and negotiations can be evolved by building trust and partnership. Some important factors in a value creating sustained business are the perceptions of who has the conversational deciding power and access to information, who can prove opportunities had and taken, what goals are set internally and agreed upon, and what are the expansion opportunities. All these factors can be leveraged in favor of any participating party and used to create value in any point of contact. (Geoffrion et al. 2015.)

4 Research strategy and methods

Chosen strategy for the thesis is to conduct action research. Research is conducted iteratively by creating a process map of the customer expectation management through interviews and the conceptual framework. Implementation of change is facilitated through coaching and observed through qualitative analysis.

Strategy and methods are chosen according to what combination felt most suitable for the research, employing company and its staff. The objective of the study is to recognize the customer journeys possible touchpoints, in which expectations can be managed, and their suitable affecting elements. To identify possibilities and to form an explanation according to outcomes, action research was deemed most plausible.

Main research question aim to answer what is necessary to know about expectations in general, usual customer behavior and one’s own role in managing expectations. The research questions were considered when forming semi-structured interviews and feedback section of the customer expectations management program.

Sub-questions 1 and 2 aim to identify the optimal communication pathways and necessary information to be gathered and had when communicating with customers. The answers to these questions provide necessary information to make the decision, what, when and how is being communicated in different points of the customer expectation management program. These questions form a more focused explanation, what should be done to reach the main objective.

4.1 Action research as research strategy

Action research can be defined as research that uses conscious collaboration of participants in a way that satisfies scientific requirements and promotes democratic social change in an environment. Action research can be used as a research practice that aims for reforming the researched subject. Collaboration of stakeholders in action research is a key element for gathering data. Action research is also a way of working in a collaborative manner during research and generating knowledge and bringing forwards positive change. Through methods of action research, a practitioner should be able to tell what does and does not work, and how it is so. (Greenwood & Levin 2007, 2; McNiff 2013, 22-23.)

According to McNiff (2013, 89) planning an action research project necessitates looking at what is being done, why and how it is done, what is the desired outcome of the research and how can it be evaluated.

According to McNiff (2013, 90) action research can be modeled like follows:

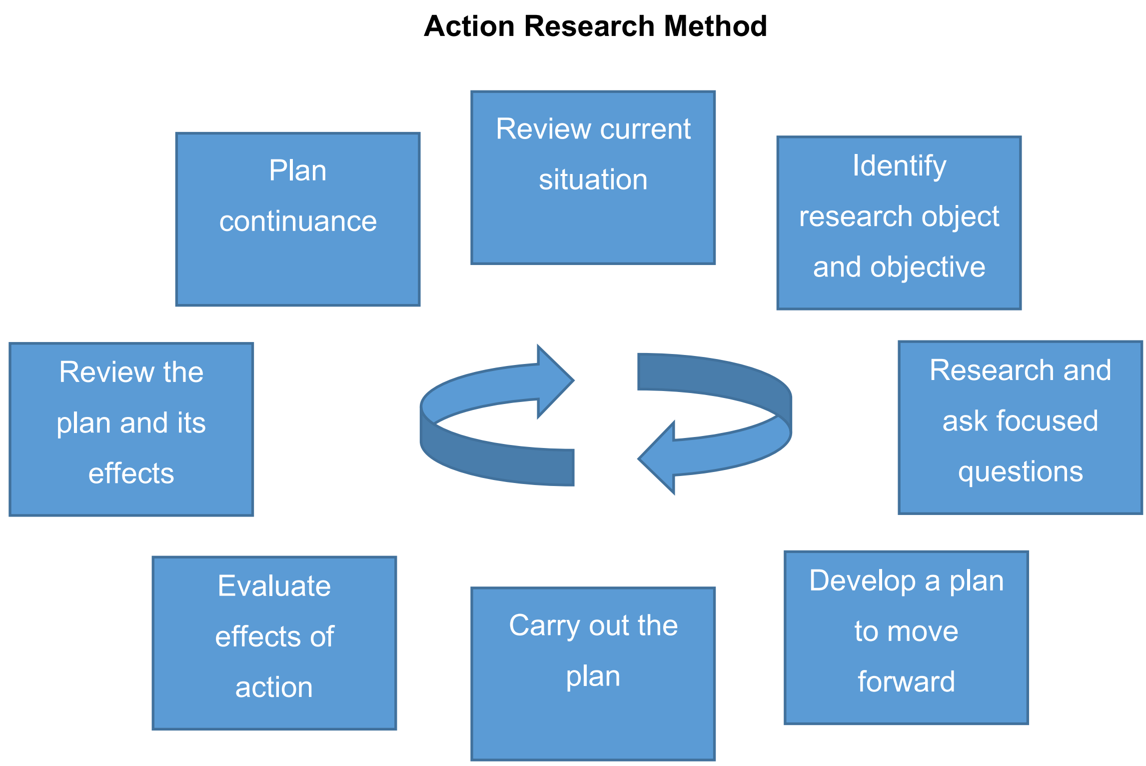

Figure 4. Action research model (adapted from McNiff 2013, 90.)

When carrying out action research, it must always be remembered that socio-economic, political and historical factors will affect the research. The research will always show a sign of the times it was carried out in, and it must be remembered that the sought benefit is not necessarily a benefit for all. Action research is done for knowledge and knowledge will be used according to needs and wants, it is a huge factor for whose needs and wants. (McNiff 2013, 175.)

In the light of works of Greenwood & Levin (2007) and McNiff (2013) it is safe to say action research is best used for research that can repeat the same situations in a controlled way and with only the desired factors altered. The nature of action research is a cyclic one, and therefore repetition is necessary. Since sales teams are not likely to go through multiple continuous facilitation sessions, the guidelines or playbook of facilitation should have an immediate impact. To best answer the main research question, an employing body of a facilitator organization or a consulting group could be beneficial for repetitive testing and gaining access to multiple businesses. Action research seems to be best used in research that aims to research, evolve or alter the current state of affairs in a given situation. There can be factors that affect the framework, should quantitative or qualitative background research be conducted, but these would be industry specific.

Action research also gets better with time, as the process is repeated and researched more and more.

4.2 Methods of conducting the research

Every research project studies different cases, but not all research studies are case studies. Case study refers to a style of research where a particular event or series of phenomena are studied. Case studies examine their subject in an applied manner, not only in theory. Holistic, precise and comprehensive view of a case should be formed during the study. Case studies can be defined in a large number of ways, but enough similarities exist, that defining core elements can be identified. Case studies core elements are, that they study a particular or a number of defined cases that are complex but limited by definition, the cases are studied in a set context and their analysis is holistic. (Tight 2017, 8-9.)

A well conducted case study is understandable to the reader and explains in a detailed manner what has been done and why. Interpretations in the study are reasonable and can be defended, and relations to other research on the topic can be found. Case studies also suggest further actions to improve the case. (Tight 2017, 45.)

Case studies are well suited to study for small businesses. Case studies can be applied to examine different facets of possible avenues of development, both on management on activities inside the business. When conducting a case study of a small business, it is important to explain the choices that have been made in the context of both the company and the study. (Tight 2017, 71.)

Qualitative methods of analyzing and reporting case studies focus on recording the understanding of phenomena, through participation and other actions, documentation, and interpretation of them to form an understandable explanation. (Tight 2017, 173.)

Process mapping is used in this thesis to visualize the workflow and possible touchpoints a Senior Manager guides a customer through. The process map is constructed using interviews from NBO partners. The process map helps in finding the answers to the research questions by showing where and how the expectation is currently born.

Process mapping is visualization of work, that helps an individual understand a process or part of it. Process maps can be flowcharts, relationship charts, architectural models and a wide variety of other items The common nominator is, that process maps make work visible and understandable, giving it a frame of reference. Process maps can be used to evaluate an overall process and parts of it, to form a cycle of evaluating, planning and improving. (Damelio 2011, 30-32.)

Semi-structured interviews are used in this thesis to evaluate the starting situation regarding customer expectations management, desires of management towards shaping the expectation management and the starting situation and ability of the operating senior manager.

Semi-structured interviews are non-standardized, qualitative research interviews, with key concepts and questions laid out, but able to expand or leave out parts of the original interview plan. Semi-structured interviews require recording the interview as audio or taking exact notes. Semi-Structured interviews typically contain time for open discussion. It is important to note when conducting this kind of an interview, that the present space and situation, used tone of voice and how questions are presented may affect the responses and answers of the interviewee. Semi-structured interviews suit case studies well, as they are usually evaluated qualitatively. Semi-structured interviews excel in answering what, why and how questions. Because of this quality, semi-structured interviews are great in finding out what is happening and in what context. (Saunders, Lewis & Thornhill 2016, 391-392.)

Semi structured interviews can suffer from a lack of reliability, if the person being interviewed has an ulterior motive or agenda, or if the answering the questions in a certain manner can affect their status. Being aware of this risk, it is considered but not factored in this research, since the sought results are preliminary, and further validation of the program should be sought by implementing a further developed version of the program.

The semi-structured interviews were necessary to form a viewpoint of what is being currently done and how. The interviews do not aim to solve any research questions, but chart what is being done, how and why, and how is it currently working. These interviews were crucial in finding out what the program is being built upon, even if they do not aim to answer any research questions themselves.

Coaching is used in this research as a way to guide and facilitate the learning of a senior manager, in order to implement the first test cycle of expectation management program that gathers the analyzable information of the research. In this thesis the role of a coach is a guiding role.

Coaching is an umbrella term for the process of helping another person or group learn or enhance their skills, abilities and understanding of a subject or concept. A coach can be an expert on a subject, a motivator or a guide on a project. Ideally coaching transfers knowledge and abilities so another person can perform in a more beneficial manner. Badly prepared coaching can have an adverse effect for learning and hurt personnel work-relationships. In short, coaching is the process of defining who coaches what to whom, assessing the current situation, building mutual trust, evaluating common situations together and what should be known about them and how to act upon them in the future. (Chen 2003.)

5 Starting situation and desired effects from NBO

New Business Office is a sales management consultancy, focusing on the starting phases of B2B sales. NBO provides its customers with reviewed and proven leads by facilitating initial discussions with prospect companies. NBO focuses on the top-2000 companies in Finland, which are estimated to represent 1% of Finnish companies, but also the 60% of Finnish buying potential. NBO prospects top level decision makers and finds out their wants and needs. This information is bundled and delivered to customer companies, which in turn have a higher change of providing targeted services to said prospective companies. Companies employing NBO typically have an average single sale of 10 000€, a sale cycle of multiple months and are focused on the top-2000 companies in Finland. (NBO 2021.)

To map out and evaluate current action and plan future actions, a semi-structured interview of the NBO CEO was held. In the current situation senior manager-personnel are managing customer expectations by allocating time to contact them just for the purpose of talking about their feelings and satisfaction levels. These contacts are used to later use the voice of the customer, to further evolve NBO activities towards customers. It was discussed and made clear that no other functions relevant to this study are furthering customer expectation management at this time, so the study is entirely focused on these operators. The results of this study are directly aimed at senior manager -personnel, but information will be used to affect beneficial change in all customer-facing personnel at later time.

Issues to be solved through customer expectation management are the prolonging of average customership, customer satisfaction, increasing the NPS and saving time not spent on corrective action. Success in implementing the results of thesis work is measured with customer retention, average life cycle of customership and volume of opportunities in added sales. Validation on how correct the suggested actions are, is initially done inhouse but might later be validated through customers. In order to validate personal professional growth of implementing senior manager, a SWOT table is created before implementation of initial touchpoint action suggestions.

To be beneficial on desired level, the thesis should produce a process map and touchpoints of customer expectation management. Coaching guide is not necessary on how to implement change, as senior manager should already be prepared to implement according to suggestion. Validating query should be prepared in accordance with the suggested action to better understand what is being affected, and recommendations on how long the managing of a certain touchpoint takes time is suggested, to understand the allocation of resources.

To better facilitate change, implement a qualified customer expectation management process, and due to wishes of CEO, a self-assessment form was developed to map out current viewpoint, understanding, action and ability of the implementing senior manager. The assessment form included current viewpoints on the subject, recognized touchpoints in the pre-existing customer journey map, where customer expectation management can take place without added engagement, and SWOT analysis on the possibilities of customer expectation management from three viewpoints. Possible added touchpoints were also inquired upon, but none were received. The assessment form was filled on 14.5.2021 by a senior manager, with minimal guidance by Topi Reingoldt, to map out non-guided thoughts and situation on the subjects.

Viewpoints on customer expectation management were on par with the expectations from company CEO. Benefits and challenges were recognized by all parties to consider the longevity and satisfaction of customerships by solving challenges in non-understanding, of where and how expectations are formed and how they affect the relationship of companies. All participants at this point were in unison, in pre-recognition that longevity of deals, satisfaction of customers, retention and availability of more detailed discussions are self-evident values to be reached out for. Senior manager understands customer expectation management at this point, as creating understanding for all participants of what is being done, attained, and aimed for, and also creating understanding for the customer, what is expected from them in order to keep a functioning trade relationship going. Customer expectation management, according to senior manager, also includes mirroring own work against expectations.

The touchpoints where customer expectation management happens vary in team composition, channel of engagement, role of participants, desired outcome of the touchpoint and available information necessary to facilitate customer expectation management inside touchpoint. The ability of senior manager also varies from non-understanding to excelling in customer expectation management. Customer expectation management is not the focal point of any point in the customer journey map. Suspected touchpoints with the most potential to affect customer expectations are the initial briefings of NBO by the customer and meetings on delivery and feedback. In both points, the senior manager is the leader in the touchpoint, there is not enough information available currently how to facilitate customer expectation management, new business managers are taking part in the touchpoints and higher management is not participating. Senior manager has excellent understanding of how to facilitate the touchpoints' main function, but not enough information on how the handle the customer expectation management part. These points are some of the first points in the customer journey map. Second major improvement can be affected in the continued delivery of service and adaptation to new models. In this touchpoint, there seems to be higher ability than before, but not enough data to affect change. This is suspected to be, because of the lack of pre-set goals and lack of creating expectations for the customer. In this way, the customer probably creates their own expectations that may or may not be in accordance with what NBO believes the customer to expect. Expectations are likely formed even before the initial meetings by NBO and customers, there is no considered approach, and therefore no data on by who, why and how subliminal expectations are set. It is also worth noticing that customer expectation management duties should either be handed over from sales function to senior manager when entering a deal-stage or be wholly initiated by the senior manager in the first meetings to discuss possible trade deal.

The proposition in this starting review is, that expectation management is not started soon enough, thereby not giving the right mindset for the customer and tools to measure for the senior manager. This leads to inability to facilitate detailed discussion on the mode of operations and possible realistic outcomes. Without discussion, the customer expectation management truly only starts when a customer decides to prolong the initial deal, and corrective discussions have already been had when misunderstandings have happened. These corrective actions take time from NBO and generate distrust and unhappiness in the customer. This way customer expectation management in its current form starts with a problem. Other way of looking at Customer expectation management is that it currently consists of best practices by a multitude of NBO staff, with no central communication hub to consider what the whole looks like.

Cross-examining SWOT-analysis for effects of change in customer expectation management, when focal points are self-SWOT, Customer-SWOT and NBO-SWOT resonate the same change in all categories. Strengths lie in wide multi-field cross-experience, utilized to create a unified and reasonable scope of available business through discussion. Weaknesses pile up in time management and workload for 1 person. Also, sudden possible changes in personnel may create a weakness for the company if only trained personnel walk out. Recognized opportunities aim to prolong and raise value of customership, through added quality of delivered content, and create beneficial cross-experience between different industries for the senior manager. Threats are considered the same as weaknesses by the senior manager. It is implied that allocating approximately 80% all customer expectation management to 1 person can lead to lack of time, higher stress-level and hasty management, creating a negative customer experience through Customer expectation management. It is understood that this program is at an early stage, and threats are considered before cementing the process to avoid negative outcomes.

In order to map out the current process of setting up new business sales, and to have a possibility to understand where customer expectations are born and managed, an interview with NBO partner was had on 12.5.2021. Literation of the interview can be found in appendix 2.

From the interview with a partner a preliminary process map of current new sales process map, with adverse customer reactions was build. The map is designed to point out possible pain points where expectations can be managed.

The interview with a partner and subsequent process map found out some possible issues to challenge with expectation managing. Possible issues to manage and increase overall understanding build upon themselves during the process. A strong leadership and guiding system is in place with the NBO sales function, but its style and amount of content does continue after the handover to project management. There are delays in both internal and external communications when deadline are not immediately set. Aforementioned items lead to fuzzy expectations with all parties, with a possibility that unrealistic and implicit expectation exist.

Lack of communications and common understanding often seem to lead to misunderstandings in the later phases. NBO does not always understand that customers need to be guided in a surprisingly strong manner and the need for information from customers behalf needs to be explained often in detail. Customers do not also always agree with each other, so when they are asked detailing questions that they did not expect, misunderstandings can be born.

Previous misunderstandings pile on and can manifest strongly when first service is delivered. Service and its results may seem weird or undesirable. These are then communicated by NBO, and modes of conduct can be altered to better suit customer needs, now that there is more common understanding. This in total eats away at the mutual trust and customer experience. The service should be understood, and projected results communicable from the co-operation starts.

NBO New Business Sales process with most usual adverse customer reactions

Figure 5. New Business Sales process with adverse reactions

6 Designing the Customer expectation management process and conducting the study

This chapter of the thesis explains and describes the process of forming a customer expectation management program for the thesis. The expectation management program collected the data which will be analyzed later, to evaluate the effects of the action research and its success. The process and study follow an action research model, described earlier in the thesis.

Planned timeline and actions of the thesis are presented below:

Thesis work order and timeline

Figure 6. Thesis work order and timeline

Current situation was reviewed by conducting interviews from different viewpoints. After the contextual framework was constructed, the interviews were again read repeatedly to recognize themes and similarities. Themes were drawn from contextual framework-suggested items, that affect customer expectations. Themes were quantified to form a proposition, that would be tested with the customer expectation management program. Personnel from NBO were interviewed with focal points of what is being done, what is desired and how other actions are seen from one's own position. A major influence for the thesis was a current action and ability-themed interview, that influenced greatly the scope of actions that could be carried out. Current action and ability-interview, paired with a previously studied customer journey map, allowed for pointing out the touchpoints in which action could be taken. The interviews were themed as current action-, desired effect- and current action and ability interviews.

Desired effects set by the employer were usual business metrics. Customer retention, increased customer satisfaction and net promoter score, added sales possibilities and a more guided process were desirable. These would also be the in-company metrics used to evaluate the thesis. From a high management point of view, the journey to better customer expectations and experience management was started by senior managers, who scheduled meetings with customers, with the focus of talking about their feelings towards cooperation. Whatever propositions would arise from the thesis, NBO wanted the results to be applicable in everyday operations of all customer facing personnel. NBO does not wish to validate the customer expectation management program with actual customers in this initial cycle but might in a later one. Desired materials were a process map of customer expectation management and an evaluation form for it.

In the data gathering phase, anonymity of the informants was secured by hiding all personifying data, from which less than 3 people could be identified. Work titles, genders, names and ages were all hidden. NBO is a small company, so securing the anonymity but identifying key acting personnel from the thesis viewpoint was no small task.

Initial current situation review was done only by conducting the interviews, to identify and set the research object and objective. From the interviews it was clear that aiding the work of senior managers and offering them tools, coaching and tips would be the most pleasing and efficient way to reach the higher customer satisfaction goals set by higher management. Research object became, what can be done to grow the overall abilities of NBO personnel, to affect customer expectations more easily, and what are to correct channels and ways of communicating them.

Research was done by studying and writing the contextual framework. Customer expectation management in general was studied, where most of the material was found in customer experience management studies. Customer journeys and touchpoints were studied, to understand how, when where and why expectations can be managed.

A clear general research gap can be identified in the field of expectation studies. Contextual framework offered help in identifying and categorizing customer expectations, to which direction they should be guided and how. A low volume of material negatively affects the credibility of the framework, but the fact that all researchers and writers write in accordance with the same issues, adds to credibility. Expectation management is often studied in a case specific manner, and studies very company or industry specific phenomena. In these cases, contextual framework was also constructed from light sources and used company specific interviews for material. In conclusion about credibility, the framework is credible, if light, and more research could be done in the field of expectations management and studies. Especially general quantitative analysis on expectation management could open possibilities for a wider understanding on expectations.

Customer journeys and touchpoints framework is used here to construct the expectation management programs guidelines. There are a multitude of possibilities for journey and touchpoint mapping, so a limited study was chosen for the thesis. Using multiple sources that support, and do not anywhere contradict each other gives credibility to the framework. It must be mentioned that a multitude of different styles of journey mapping exist, and could have been given consideration for the thesis. However, the model used here was familiar and therefore the study more precise.

Before a plan to move forward could be developed, focused study was necessary. Interviews were repeatedly read in order to recognize themes and recurring statements and similarities. From recurrence, a table was constructed (Appendix. 5) where recognized themes and statements were marked and prioritized by how many times they were mentioned. From this data and cross-referencing theoretical framework, suggestions on how, when and where expectation management could happen was constructed.

Contextual framework, especially Villanis work suggest starting expectation or experience management by profiling a decision maker that the program looks to affect. This was considered, but the notion was discarded, due to the program's initial nature. The expectation management program seeks to affect multiple parties on an initial level. Backed by the desired effect interview (appendix 1.) it was decided that profiling industries or their usual personnel to be affected, would be left for additional development cycles in the program.

Initially, before designing the customer expectation management program, gathered data focused on recurring information that was explicit in the interviews. Gathered data was categorized into 4 categories. The categorizing happened through repeated reading and thematic recognition and coding a table (appendix 5.) to note the volume of the same kind of notions.

Categories that had recurring notions were:

- Action and skill from NBO’s side
- NBO communications and understanding the customer
- NBO’s desires and expectations
- Customer actions, desires and expectations

Data that was gathered had notions to the materials found in the contextual frameworks and could be used to design the expectation management process. Gathered data took notion of both customer and supplier viewpoints, and created a more holistic understanding on what actions, desires and expectations led to each other and how.

Pre-program data was also gathered from a premade customer journey map, where supporting notions towards expectations management were found. Initial data showed that expectation was formed uncontrolled by one entity but formed by multiple operators. These independent operators were interviewed and analyzed separately, to not facilitate any changes before the program was started.

Initial coded data from interviews consistently and often showed the following notions:

- Action is taken to manage expectations, but it is unspecified what is being done
- What not to expect is specified, but allowed expectations are always not
- Operators skillsets in the matter are wide but unspecified
- It was self-stated that there exists an understanding of what expectation management is, but no deeper understanding on the subject
- Customer retention is the most important focus, satisfaction is secondary
- Customers want quick action and strong lead and communication from NBO

Less recurring, but noticeable points of interest are:

- If Senior Managers don’t act fast and communicate strongly customers return to NBO sales function for clarity
- NBO is evaluated against booking services
- The service of NBO is not clearly and often enough communicated to customers
- Correctional action later on could possibly be avoided by expectation management
- The sales function establishes initial expectations by their strong communications and action, which Senior Managers often are not able to follow up
- The inability to follow up the style of leadership sales function establishes, is due to workload on senior managers

Notions the did not reoccur are not widely discussed here, but most singular notions support the previous notions, by explaining them through lack of unified communication towards the customer, lack of knowledge on the subject, varying knowledge on best-practices methods, and the lack of documented process.

From the gathered initial data and a previously constructed customer journey map, an expectation management journey map was constructed. Journey map was then broken into touchpoints. All touchpoints were analyzed, goals set, and actionable suggestions given. Executing senior managers skill was previously evaluated in different touchpoints, and that data was carried over, to later evaluate change in expectation management. A proposition was formed in the spirit of explanation building, that any decisive and descriptive action that can be described to customer clearly, will result in better expectation management and experience, than current style of guessing expectations and not telling what customers are allowed to expect. These steps led to construction of the customer expectation management program, that was coached to the executing senior manager.

From the initial data, a proposition was formed to facilitate explanation building. The baseline for the proposition is, that expectation is not truly managed, because there is no decision in place to manage expectations of customers, only a basic understanding that expectations form the experience later. Leaning on this analysis it is proposed that any decisive action that has a singular goal, specified message to customers, unbroken communication chain and documentation of what to expect, makes expectations and therefore the customer experience better, when the aim is customer retention and satisfaction.

The process map for customer expectation management was formed by recognizing the optimal points of action for Senior Managers. Points were deemed optimal, when they already had customer interaction, that clearly had a meaningful, documentable agenda and added information to the work process. This way of thinking was meant to save time from Senior Managers, and streamline the expectation management, optimally to decrease workload later on in correctional action. Touchpoints were identified, and actionable goals that built on each other were provided to guide the expectation management.

To create the expectation management program, the journeys touchpoints and their factors were identified. The identified factors were:

- what NBO teams engages customer and who leads
- what channel of engagement is used
- what is the Senior managers role in this touchpoint
- what is the presumed customer expectation
- into what type is the customer expectation categorized before the program
    - Implicit/ explicit
    - fuzzy/ precise
    - realistic/ unrealistic
- what information is necessary for touchpoint management
- how previous contact affects this touchpoint
- at what customer journey point does this touchpoint happen
- what is the aim of action for this touchpoint
- what is the desired main outcome of the touchpoint
- what is the aim of expectation management for Senior Manager in this touchpoint

To evaluate the success of the program, a questionnaire for Senior Manager was added to the touch point instructions. Notions included in the questionnaire were:

- After the program, does the Senior Manager feel their skill level has risen to facilitate the touchpoint
- What is the customer expectation type after the program
- How did the customer expectation change after the program
- is there enough information available on touch point for the Senior Manager after the program
- What changed from the Senior Managers viewpoint
- How did customers receive the changes in the program
- How does the program affect future expectation management from Senior Managers viewpoint
- What changes does the Senior Manager recommend after the program

After the creation of the customer expectation management program (appendix 4.), it was coached to the Senior Manager who later provided the feedback. Gathered data was studied together and discussed. The goals, situations, recommendations and chain of events in the expectation management process were gone through, but no substance on what to directly communicate was given, since those are a case-by-case subjects. Main emphasis was, that what has been done before the Senior Managers part in the chain of events, and how to transform that process into a successful customership with expectation management. There were 2 coaching sessions, initial one using the expectations management process map and clarifying the entire process, and a second one going over the touchpoints and their different factors. This program and its feedback constitute as the collection of data through a case study.

Senior manager executed the program over 3 months' time since most touchpoints do not occur often. The senior manager had multiple points of contact with different customers, in order to have a more wholesome view and opinions on the success of the program. The senior manager then filled out the evaluation forms for feedback. An average of 2,5 customer companies experienced the program.

The evaluation of the program was again coded as a table (Appendix 6.) to recognize recurring themes and repetitive notions, so findings, results and recommendations could be written. Source material, that was read repeatedly to find recurring themes and notions, was the evaluated Customer expectation management program. The proposition for better expectation management was supported by explanation building, that the repeatedly read and coded data revealed. The revealed data also helps suggest more continued actions and future research.

The findings of the study, and deduced proposal, are credible as initial phase or proof of concept for expectation management. Sample size of customers that were engaged in touch points, their fields of business and time of engagement varied, while the engagement method stayed the same. The findings and results are validated through experience and collected data of the implementing Senior Manager, that all modified touchpoints changed for the better, and for every customer who was engaged through the program. Methods of study proved to be valid to create a measurable and effective program.

Credibility of the findings is not questionable, when considered as initial results. No pay or other reimbursement was offered for thesis work, or to the Senior Manager implementing the program, so findings and results were purely sought after for evolving work capabilities. Credibility can always be questioned through sample size, but as 100% of customers that faced the touchpoints were guided through the expectation management program, no control group exists, and there is enough variance of customers for all touchpoints. Credibility would be further studied, by implementing a profile specific expectation management program or establishing a control group that was not guided by the program.

7 Findings and results

This chapter of the thesis discusses the findings and results of the customer expectation management program. Findings are categorized and compared to the proposition formed before implementing the program, creating a deducted explanation. Findings are also compared to the theoretical framework and discussed in that context. Discussed here are also the result of the thesis work and customer expectation management program. The case study produced a tested process model of customer expectation management with an integrated evaluation tool on its success.

7.1 Findings

When building the theoretical framework, a noticeable research gap was found. Expectation management is not a new idea or study, but one that has not been widely studied specifically. Expectation management is often considered as a side note, for example in Customer Experience 3.0 by Goodman (2014) or researched as case studies, like in the study of Ojasalo (2001). Expectation management is often tied to experience management, by recommending companies to find out what customer want or expect, but often no actual data is found on expectation management in general. Literature on expectation management usually recommends repeatedly asking customers what they want, and very few models are offered. Recommendations, models, and studies show a clear trend to ask customers about their wants and implement this into something else than expectation management. Case studies offer insight into what can be done and managed, but their explanations are always industry and context specific

Findings were gathered and made into a table (appendix 6.) from the implemented Customer expectation management program, which feedback section the implementing Senior Manager had filled. The feedback section qualitative data was gathered by the implementing Senior Manager, by asking how the customers facing the touch point felt, after it was implemented. Results were also stated by the Senior Manager when self-reporting the findings was an applicable option. Self-reporting can include some reporting-bias risks, which were however considered minimal on non-existent considering possible self-interests. Material was read repeatedly to find recurring themes and notions. Themes and notions were categorized into 3 sections. Categories that were recognized are changes in customer, changes in NBO and Changes in the expectation management process. The phases of the customer expectation management process map acted as an x-axis, and recurring themes and notions acted as a y-axis. Themes and notions were named and marked on which process touchpoints they were present. Number of notions varied from 0 to 6. Only 0 notion that was notified is that the implementing Senior Manager gave no improvement recommendations to any touchpoint.

Initial proposition was that any decisive action that has a singular goal, specified message to customers, unbroken communication chain and documentation of what to expect, makes expectations and therefore the customer experience better, when the aim is customer retention and satisfaction.

Changes in the customer and their total number of notions in touchpoints were as follows:

- More precise expectations 6
- More explicit expectations 5
- Customer is happier with the new process 5
- More realistic expectations 4
- More data from customer available, easier 4
- Customers participate more willingly 4
- Customers do what is asked of them 1
- Customers provide more info automatically 1
- There are less misunderstandings 1

Changes in NBO personnel:

- There is enough information available 6
- Next steps in the process are clearer 5
- Volume of communications increased 4
- Rank of necessary skills is higher 4
- Rank of necessary skills is same 2
- Less insecurities in own actions 2
- New possibilities recognized 1

Changes in the process:

- Process is timed better 5
- Process is clearer to customers 5
- Process is more efficient 4
- Expectations are discussed earlier 3
- Process is clearer inhouse 3
- Negative scenarios are discussed 2
- Clear expectations are communicated 1
- Improvement recommendations given 0

The customer expectation management program had specified goals, messages, and documentation, that aim at customer retention and satisfaction through increased amount of explicit, realistic, and precise communication. The baseline for the proposition was, that there exists a basic understanding of the underlying issues, but no singular and streamlined way of engaging customer expectation management. With the program, which had a simple continuous message and decisive communications, expectation management became clearer, easier and overall, more beneficial for everyone. The gathered data, supports the initial proposition.

Customer expectations were documented as better in more than 50% of the touchpoints, in categories of them being more precise, explicit and realistic. In more than 50% of the touchpoints customers were perceived as being happier and more willing to participate in touchpoint actions, specifically in providing more data from their part. Customer proactivity also increased in 1 touchpoint and there were less misunderstandings in 1 touchpoint.

From a Senior Managers point of view, all touchpoints now have enough information available to better facilitate them, next steps are clearer in 83% of the touchpoints. in more than 50% of the touchpoints, volume of communications is perceived in being higher, and the Senior Manager feels that their skill level of executing necessary actions is higher. There are also less insecurities in 2 touchpoints and new action possibilities recognized in 1 touchpoint.

According to the Senior Manager, the process is now timed better and is clearer to the customers in 83% of the touchpoints. Inhouse, overall process is clearer in 50% of the touchpoints, and in the same number of touchpoints expectations are discussed earlier. Negative result possibilities are discussed now in 1 touchpoint. No recommendations for future were given by the Senior manager.

Findings support the proposition completely. As proposed, clearer, more pronounced, and documented communication improves expectation management and therefore experience, both for customers and NBO personnel. It is not clear from the case study, that how much could have been achieved alone by documenting the earlier processes before implementing the program. Documentation clearly reminded all participants of what is expected from them at all times, so more information and communication was born.

It was found out, that many steps and methods of communication were in the process already, when they were remembered. A lot of issues were already noted by somebody sometimes, when there was time to attend to them, and if they were remembered. It was found that documenting a way of engagement created reminders for necessary issues to discuss. The effects of expectations management were also found out to be cumulative. As the process proceeded, expectation management became easier and easier, as the mode of communications and working became a standard for all participants. Customers were found out to participate more, when they were given an agenda of participation, and reasons why they must participate. Discussing possible outcomes and scenarios, through average experiences with NBO projects, also helped the customers understand what can and cannot happen if projects are carried out as discussed.

In personal skill, findings indicate that the Senior Manager had all the necessary skills to facilitate expectations, but lack of available information and data made remembering all the steps hard. Documentation increased the amount of information available, that in turn translated to a feeling of higher skill level and less insecurities. When there was a feeling of security in personal skills and enough information, the process felt clearer and more controlled.

In customers, data of findings shows that they were willing to shape and reform expectations, when they were told what to expect, when and how. It was found that customers understood their part as information providers, when expectations were communicated clearly, and what can and cannot be done if they do not provide.

After implementing the program, customers are not necessarily more easily satisfied by provided results, but they are perceived as having more realistic expectations and therefore more easily satisfied when a situation or an event in their customership is explained. It is found out to be likely but not sure, that the overall amount of satisfaction a customer experiences, is higher than before, when expectations are managed in the programs manner.

After implementing the program, when customers decide if they continue working with NBO or quit the cooperation, there is noticeably less negative talk on issues in the volume and quality of delivered service. This could or could not be a finding. There is a correlation between companies that have experienced the new program and their tone of voice in mentioned situation, but there is not enough data to record this as a finding.

As the rank of skill of the implementing Senior Manager was self-evaluated, it is not found out if any necessary skill has grown in a measurable manner, or what kind of personal growth could have happened. In the process it was not found out how much of a difference new aspects or documentation would have made separately. Since the program was implemented, no separate categorization has been done for different types of customer industries, so nothing was found on how differently different customers respond to the program.

Findings of the study can be reviewed as preliminary, as by decision no customer specific profiling was done. Enriching of data could be done to adjust the proposition to be more precise and thorough, if a specific target customer was chosen. As this is a first edition of a customer expectation management program, goals and qualifications were met for the thesis, as NBO's decision was internal qualification and a standard practice model. Data could be enriched to be customer type specific, for more precise customer specific data.

In the context of the framework, the case study and findings support the viewpoints and previous research. As a lot of the intelligence in the framework is gathered from customer experience management studies and case studies, the findings also indicate that there is a high probability that expectation management could be further studied in itself. Literature in shaping customer journeys and touch points also supports the notion that expectation management can be further researched, as journeys and touch points seem to shape experience through expectation more than actual experience, at least in initial phases. further development could indicate otherwise.

Findings of the study mean that clearly and repeatedly communicating possible explicit, realistic, and clear outcome possibilities that can be expected, shapes the customers behavior to match them. Findings also mean that by explaining the circumstances forming the experience, expectations are understood better.

In the context of the framework, findings mean that forming a process, journey and touchpoints to serve a general customer base can be achieved, without profiling, contradicting the suggestions of Grocki (2014) and Nallapaneni (2018.). Framework indicates that no customer journeys are similar, but clearly a baseline experience can be formed without recognizing exact profiles. General, guided and decisive expectation management is more measurable than unguided and therefore unmeasured process, that is instinctively guided to suit the specific customer.

7.2 Results

The results of the thesis in physical form, are the expectation management process map, an initial expectation management program and its evaluation form. All tangible results were seen as beneficial for the company's operations. The main objective was to recognize touchpoints in the customer journey where expectation could be managed, and best holistic practices in managing them. All objectives were met.

The first tangible result to emerge from the research, was the current situation visualization of the new sales process (figure 5.) The visualization resonates with the customer journey map creation process by Grocki (2014) barring the profiling of persona and emotion analysis in touch points. The visualized process allowed for pinpointed brainstorming of the expectation management process map.

After the initial recognized new business sales process, the expectation management process was brainstormed and visualized, in order to reveal the holistic customer expectation journey. This brainstorming is aligned with the possible avenues of customer expectation management by Sheth (1996), mainly focusing in alteration of expectations through framing and directs suggestions. Context design was also present, as the notion of difference to similar services, mainly booking, was highlighted. The usual contract signed between NBO and customers leaves minor room for alteration of goals, and this was noted but not acted upon, since these alterations surface naturally when customers communicate their own goals with NBO and were not noted at affecting expectation management on a notable level.

As noted by Laba (2020), Basset (2020) and Starak (2021) expectation management must consider what customers expect to be true, communicate the difference and prove the suggested end results. All of these notions were accounted when designing the customer expectation management process map, so that the expectation management could get as fresh of a start as possible and chart its own course through projected results. The classification of expectations by Ojasalo (2001) suited the research very well in classifying the types of expectations NBOs customers typically have, and this classification is used to the full extent. The notions of Wu & Buyya (2015) set the continuous tone of voice and model of communication for the customer expectation process map and helped greatly on shaping the totality of the program, especially when it was questioned, how much corrective communications should be sent out, without it feeling belittling.

Following figure 7 is the customer expectation management process map, built using the new sales process map, (figure 5) and suggested process of customer journey map creation by Grocki (2014).

Customer expectation management process map

Customer Journey Touch point	Customer expectation management touch point
Initial meeting or transition phase	Disperse, but do not discredit, experiences set by previous services. Reset expectations by differentiation.
Sign deal, team up, set timeline-phases	Set a range of possible expectations through documented averages of NBOs results in customers industry. Use data on quality and quantity so show what has been achieved. Intro team.
Company briefing and prospecting-phase	Make sure that customers product/ service is understood by team. State this to customer to ensure mutual understanding. Set a range of goals for short and long timeframes concerning delivery. Tell about goal differentiation in timeframes. Make clear that customer is expected to provide prospects and additional coaching in certain timeframes and situations. Set and communicate measurement criteria and validation style.
First delivery-phase	Communicate and validate success with customer, mirrored to previous statements. Explain what this success means in the future. Eliminate wrong perceptions, adjust targets or action as necessary.
Continued delivery and action-phase	Same as before + Set up internal auditing and communication system, allocate a person or own time for tracking and communicating success criteria. Periodically ask customers are they happy, and state what is expected of them for continued success. Set up metrics for new expectations or disqualify them.
Decision on continuance	In anticipation, set up a ROI-interview with Sales Director. State what has been done to ensure positive results. Reference achievements on industry level if that is beneficial. When faced with criticism or negative feedback, lean to documentation on Service level agreements, action and statistics. Do not blame but check that customer has provided necessary support.

Figure 7. Customer expectation management process map

Importance of the expectation management process map is highlighted in the change from reactivity to proactivity. Comparing figures 5 and 7, a clear transition can be seen. Figure 5 was used to highlight possible pain points and actionable touch points, that could then be used to facilitate positive change in experience management.

As stated by the program implementing senior manager, the coaching went well, it was understandable and well communicated. instructions were clearly communicated, and implementation could start as soon as the touch points were encountered. All touch point actions were implemented by the same senior manager and data was collected and reported by them. the number of customers facing the touch points was 5 in all touch points.

The first touchpoint in the transition phase consisted of joint effort by sales function and senior manager. Starak (2021) pointed out that customer experience starts with expectations set by former providers, and here is the point that these notions can be dispersed. The expectation management goal was to disperse old notions on what to expect but not discredit past partners. Sales function would tell the customer that NBO will have an inside briefing on a given week, after which the senior manager would contact them. The senior manager would then make the contact and inform the customer of the upcoming timeline and events, and how to prepare for them. After the informing, an email would be sent. This more precise action made fuzzy expectations more precise, and they were more delighted and understood the difference to past experiences faster, as was evident in later touchpoints. The overall customer experience was more unified regarding the feelings towards NBO, the process is clearer to all, and the rank of skill for the senior manager grew from 2 to 3 on a scale on 1 to 5. Customers were later more prepared to offer materials and guidance for NBO personnel on how to represent their respective brands. No further recommendations for advancement of expectation management were given for this touch point.

The second touch point aimed at setting realistic expectations for the customer. Geoffrion et al. (2015) point out the importance of establishing a buying vision. Buying vision here is substituted with the vision of what exactly will be delivered, and therefore should in time establish a stronger partnership, than one without a common vision. NBOs way of working was repeated to customers, and average operating results and number communicated. When customers had differing opinions on what should be achieved, these differences were explained. Accommodation of customer expectations was notified, when possible, but in a way that they were kept as possibilities, not guaranteed results. The touch point previously had fuzzy expectations from the customers side, as they did not yet completely understand what was about to happen. After explaining what is being done, why, and to what it usually leads to, more precise expectations emerged. At this point, the senior manager took hard control of customer expectations by communicating NBO standards and therefore framing the expectation results. After the expectation management program was implemented, customer understanding grew, and they were anticipating and expected and agreeable quantity and quality of delivery. Rank of skill for the senior manager rose from 2 to 3. Customer expectations were perceived more precise and implicit than before, and NBO could anticipate possible further hardships or issues, that needed to be validated. Overall, the touch point became more streamlined, less time consuming, clear to all and more beneficial actions towards customer experience can now be taken. The understanding of the senior manager is now also on a higher level, on how a customership can be started, and discussions on past experiences are more open. Level of customer centricity also rose now that communications are more dialogue-based than before. It was recommended by the implementing senior manager that even more material should be exchanged and produced, in order to create a more holistic starting viewpoint for operating sales personnel.

The third touch point happened in what is called a kickoff meeting. A kickoff precedes the start of cooperation, and is meant to validate the engagement style and content of prospects by the customer. Goal of customer expectation management was to remind of possible experiences and share information with everyone that is participating in the collaboration, in order to have similar expectations and understanding of the service. The meetings happened through a video call, and after an email was sent documenting the meeting and what was agreed upon. Customer expectations were perceived earlier as partially implicit, more explicit if previous conversations had gone well, and customer was accepting of NBOs viewpoints in the collaboration. Expectations on the quantity of delivery could still be unrealistic and the amount of necessary sharing of information on a weekly basis was not always understood. By having very direct agreements and open conversation on how the collaboration would go, more precise realistic and explicit expectations emerged. In previous touch points, only strategic and tactical participants would be present, but by gathering all participants into a singular meeting, everything was streamlined. After implementation, senior manager reported no rise in rank of skill (4) but noted that the expectation management part of a usual collaboration is now done earlier, as previously it was partially managed only after the collaboration had started, and there were reportable results. Customers also reportedly offer more help earlier, and aid in achieving wanted results by suggesting action plans. Collaborations now feel more friendly and possible pain points can be foreseen and acted upon earlier in the collaboration, translating into stronger customer satisfaction.

The fourth touchpoint in the expectation management journey happened in the first-delivery phase. In this touch point, customers are given the first report on how sales are going, how NBO has acted and why. Initial projected results are given, and actions validated once again. The aim of the customer expectation management is to delight customer, by delivering expected initial results or better. In this touch point, framed expectations surface concretely. A high level of change can be seen in the program at this point, since all previous fuzzy, implicit and unrealistic expectations are completely flipped into realistic, precise and explicit ones. When expectations were not met, it was usually due to the touch point being met so soon, that deals did not have time to reach mature level naturally. Maturity level was explained to customers when necessary and understood in all cases. Senior manager reported their rank of skill rising from 2 to 4. There is still variance in customer expectations and level of understanding, but the variance is noticeably of lover volume than before, and overall experience is more positive. Customers had less issues and worries to discuss and more interested in the actual work of NBO. The process is more effective in time management and customer centricity. No further advice for advancement of the expectation management program was given.

The fifth touch point is a recurring one, tackling issues in continued delivery. The touch point happens in a weekly- to monthly meeting with customers to discuss what has happened since the last meeting. The aim of the touch point is to exchange information and validate ongoing actions. Previously the expectations have been fuzzy or unrealistic on the amount of delivery, but as framed in touch point 3, the expectations are now naturally more precise and realistic. Aim of expectation management was to make the expectations realistic at this point, and allow for further expectations to also be realistic, and not exceedingly cumulative. Clear communication on success, and how it was achieved and what further success demands helped greatly in shaping expectations. Rank of skill for senior manager rose from 2 to 4. Expectations are now more realistic, explicit, and precise, and understanding of variables in success has been achieved. Customers also voice their concerns more easily, and solutions can be found together earlier as totality of understanding of the situation is on a higher level. Common targets are now more mutually understandable, process is led in a more precise manner and customer satisfaction is reportedly higher, as customers voice their happiness more and without prompting them to. In this touch point, as suggested in figure 1 by Mason et al. (2015), there is a possibility to alter future action, to better bring satisfaction to customers. As customers need change and evolve, so will their expectations. If communications have been open, NBO should have a possibility to offer evolved services, before the customers starts to seek out an alternative option.

The last, sixth, touch point recurs approximately every 6 months as contracts have to be renewed, in this touch point the end of a contract is preceded by setting up a meeting with sales director to discuss customer satisfaction and return on investment. Senior manager assists in this meeting by producing statistic and quality-reviewing materials on the collaboration. In a ROI discussion, NBO aims to prove their success financially, or explain the further lack of success. The touch point is called Decision on continuance, and if the customer decides to continue, touch point 5 is again the next touch point, looping back to touch point 6 later. Added sales opportunities are also generated here, as this touch point deals with retention and offers the possibility to offer more collaboration volume. Customer expectations before, on how the meeting is going to go, is often realistic because they hold the numbers on sales. ROI expectations however can be fuzzy or explicit, of NBO has previously failed to communicate agreeable expectations. Rank of skill for senior manager did not rise but was set on 4, as they act in a supporting role here. Compared to before, customer expectations were more realistic, precise and explicit, as they had a frame of reference from previous touch points. Amount of quantifiable information was now available, as the senior manager participated in the meeting, and irregularities and projected results could be communicated in more detail. Decisions on continuance are now more understandable, and possible pain points are easier to discuss because of the totality of control from a single person. Customer relations are stronger, satisfaction higher and retention more easily achieved through building explanation on how collaboration has worked for everyone. Senior managers role in expectation management is now more concrete, permanent and clear.

The intangible results for the study were the increased ability of the company personnel to manage and measure customer expectations, experience, and overall journey. During implementation of the program, results of higher customer satisfaction and engagement were reported, compared to previous experiences.

The customer expectation management programs results were experienced so positive, that it set a new standard for defining and managing customer expectations and mode of operations for starting a new customership.

Main research question, how to create, guide, avoid, meet, fulfill and surpass customer expectations when working as a consultant team-leader was answered. It is suggested by Grocki (2014) and Villani (2018) that best answers to presented questions need customer profiling. Results indicate that universally all aspects can be controlled to the company’s benefit, as long as the message and its delivery to customers is unified, repeated and explained. Best practices for different aspects also vary in nature, depending on the touch point that is being engaged. Specific message and mode of delivery to customer depends on the customer, but universal guidelines were beneficially created for different touch points. Universally direct suggestions and priming for expectations, as suggested by Sheth (1996), were the best options to convey an understandable message.

Sub-question 1, what are the optimal channels, situations, volume, and contents of contact to create more value in customer expectation management was answered. Absolute best practices require profiling, but a universal beneficial model exists. Results indicate that personal contact, initially through phone, takes the least amount of time to manage, which is appreciated in business. Calling also allows for highly personalized cooperation in. Calling, followed by instructional emails and meeting suggestions were perceived as the best mode of contact, so that everything was agreed upon, documented and actionable upon on the next step. Optimal situation to make a contact was always one or two weeks prior to an engagement, through phone and follow-up actions. As Basset (2020) and Starak (2021) suggested, constant communication through a project is necessary to facilitate and keep up expectations. Customers perceived more information to be better than less, and were better prepared, the more they knew in advance. No customers complained about the amount of information, so a negative saturation point was not met at any time. The content of engagement consisted of spoken information, that was later documented in an email or an email attachment. Content focused on future questions and decisions on practical business issues, and what possibilities these present to co-operating companies.

Sub-question 2 was answered. The question was what kind of support, coaching and guidance from higher management, and data from supporting members is necessary and beneficial for customer expectation manager. As most steps in the program, their engagement mode and content were standardized, support and coaching from higher management consisted of executive decisions on necessary issues, like what exceptions the company was ready to make to standardized practices based on customer desires. Beneficial data from the operative level became more pronounced, the farther customer journey proceeded. It became evident, that during a prolonged customership, operative personnel had collected unspoken and documented customer concerns and notions, which were beneficial for the Senior Manager, once made explicit.

In conclusion, the main objective was attained, and research questions answered in a beneficial level, that can be improved upon. Improvement could not be attained in this study, due to the restrictions that were decided on profiling. The product of the thesis was beneficial and eye opening, and already standardized current actions into a more measurable and beneficial form.

Customer benefit from a more controlled and documented process. The new process is more understandable, and leads to more defined and understandable experience, than can also be better improved upon, when there is an understanding, what need improvement. NBO benefits from the more understandable process, through continuous measuring and understanding the customers expectation better than before. Thesis worker and Senior Manager benefit from the personal and professional growth working on the thesis has offered.

7.3 Reliability and validity

Reliability and validity are used to measure how credible and believable the results of a research are. Reliability measures the ability to repeat the research in a manner presented in research, which produces consistent results. Results can be considered reliable if they can be arrived at by more than one person. (Hirsijärvi, Remes & Sajavaara 2010, 231.)

Reliability was achieved by discussing used methods in their use cases, in their respective chapters. Reliability is also sought by clearly presenting the scope, timeframe and nuances of the research. The thesis is reliable in its own frame of reference, but implementing in it different companies, would probably yield different results. Since the thesis is action research, implementing it again would also yield different results, since it would be a second round of implementation.

Validity measures how believable and credible the research is, by evaluating the used methods. Validity considers, do the questions and methods try to really solve the issue, that the research claims to study and are they the best ones to use. (Anttila 2006, 512.)

Validity in this thesis was built by using case specific, provenly valid methods, discussed in chapter 4. Research questions aim to solve necessary partial elements, vital to creating the customer expectation management program.

According to Vilkka (2021, 101) When reliability and validity are evaluated, the results should also be considered. If the goals of the study are not attained, self-evaluation can lend credibility to the study.

Goals of the study were attained, and results described in detail. Results can always be questioned through different types of reporting-bias, including seeking self-affirmation, covering own insecurities, and aiming for a certain amount of success. Further rounds of implementation, adaption and evolution of the program can be used to further validate and evolve the results.

8 Self-learning, reflections and recommendations

This chapter contains discussion on the thesis subjects, unresolved issues in customer expectation management, reflection on thesis work and own learning during the thesis work, and future recommendations that spawned during the thesis work.

The thesis consists of multiple elements of coursework during studies in Haaga-Helia. Elements of customership management, strategic thinking, customer journeys, learning organizations and also coaching and facilitating are present. The thesis employed a multitude of methods and viewpoints that had been taught in classes between 2019 and 2021. Thesis united a lot of learned items into one study and worked as a finalizing element in master’s studies. The thesis helped greatly in bringing most studied courses in Haaga-Helia to life, through a real case study, that affected the employing company.

Theoretical framework of expectation management was hard to find, mainly because of its sparsity. Expectation management is not a greatly published issue, and second to none literature seems to exist. Most literature in expectation management are very case specific. Luckily case specific literature also draws upon some similarities in experience management, and experience management studies make notes on expectation management. The framework discovered a study gap in expectation management, that could be studied in a universal manner.

Constructing semi-structured interviews, cross-referencing their results and drawing process maps and plans was probably the simplest but most time-consuming item in the thesis work. As touchpoints had to be understandable and manageable independently and together, their elements had to be carefully planned. As items and notions were added, there had to be multiple cross-touch point checks what would be acted upon later or earlier. As action in one touch point changed, other actions had to be also changed. The process map was easily enough distilled from the customer journey.

The thesis work took longer than initially expected, because the data gathering touch points were sparse during the studies. Reasonable amount of data was gathered in the end, and repeated elements in it inspected with great scrutiny, to achieve valid and credible results. The number of necessary items in the appendixes grew to a surprisingly high one, but since this study was first of its kind for NBO, the amount of background work is understandable.

At start, the thesis plans laid out a more detailed anticipation for best practices in different touch points. During the studies into the contextual framework, mirrored against the employers will, to make a baseline program, absolute best practices became unattainable. Unresolved issues center on best practices for different touch points, this would require profiling of customers and processing their unique customer journeys and emotions in them. Considering the starting point, unresolved issues exist, but are miniature in the nature of the study.

For future, it is recommended to keep evolving the same expectation management program, using additional action studies. gathering more data for prolonged time could probably point towards more precise points in the expectation management programs touch points, and what is being affected, when and under what circumstances. As a recommendation, additional profiling and customer type specific customer journeys could be studied for added benefit. Recommended evolvement paths do not single each other out. Expectation management program can be furthered either as a baseline study with added and more precise information, and customer specific journeys studied separately.

Understanding customers and their behavior is a companywide benefit, so bringing the information and its implications presented in the thesis available for all personnel would be beneficial. Coaching or bestowing information should be done companywide but in a controlled manner, so that everybody understands what this information means for their role. Staff roles could also be discussed and studied through expectation management, and enrichment done on staff roles to improve and focus the experience output through expectation management.

References

Anttila, P. 2006. Tutkiva toiminta ja ilmaisu, teos, tekeminen. Akatiimi Oy. Hamina.

Basset, B. 2020. Expectation Management: A Manager’s Guide. Medium. Available at: htTouchpoints://medium.com/@blakebassett/expectation-management-a-managers-guide-7910a1673d1f. Accessed: 5.6.2021

Damelio, R. 2011. The basics of process mapping, 2nd edition. Productivity Press. New York.

Decker, D. 2018. Expectation management: The Secret to happy customers and rapid growth. Forbes. Available at: https://www.forbes.com/sites/forbesagencycouncil/2018/09/19/expectation-management-the-secret-to-happy-customers-and-rapid-growth/?sh=4a930a3b4b29. Accessed: 10.10.2021.

Chen, C. 2003. Coaching Training. Association for talent development. Alexandria. Available at: https://learning.oreilly.com/library/view/coaching-training/1562863444/1562863444_ch01lev1sec5.html. Accessed:17.10.2021.

Geoffrion, C. Peterson, E. Riesterer, T. & Smith, C. 2015. The three value conversations: How to create, elevate and capture customer value at every stage of the long-lead sale. McGraw-Hill. New York. Available at: htTouchpoints://learning.oreilly.com/library/view/the-three-value/9780071849722/cover.html. Accessed: 20.4.2021.

Goodman, J. 2014. Customer Experience 3.0. AMACOM. New York. Available at: htTouchpoints://learning.oreilly.com/library/view/customer-experience-30/9780814433881/. Accessed 20.4.2021.

Green, S. 2017. Culture Hacker. John Wiley & Sons, Inc. Hoboken. Available at: htTouchpoints://learning.oreilly.com/library/view/culture-hacker/9781119405726/f01.xhtml. Accessed: 24.4.2021.

Greenwood, D. & Levin, M. 2007. Introduction to action research. Sage Publications, Inc. California. Availabale at: http://methods.sagepub.com.ezproxy.haaga-helia.fi:2048/book/introduction-to-action-research/d5.xml. Accessed: 25.9.2021.

Grocki, M. 2014. How to create a customer journey map. UX Mastery. Available at: htTouchpoints://medium.com/@uxmastery/how-to-create-a-customer-journey-map-42e6ac7d8757. Accessed: 23.4.2021.

Hirsjärvi, S., Remes, P. & Sajavaara, P. 2010. Tutki ja kirjoita. Tammi. Helsinki.

Hormess, M. Lawrence, A. Schneider, J. & Stickdorn, M. 2018. This is service design doing: Applying service design thinking in the real world: a Practitioners guide. O'Reilly Media Inc. Sebastopol. Available at: htTouchpoints://ebookcentral.proquest.com/lib/haaga/reader.action?docID=5219777&ppg=69. Accessed: 24.4.2021.

Kalbach, J. 2018. Customer journey maps. O'Reilly Media Inc. Sebastopol. Available at: htTouchpoints://learning.oreilly.com/library/view/customer-journey-maps/9781492031246/?ar. Accessed: 26.4.2021.

Laba, A. 2020. Expectation management: why should you care. UX Collective. Available at: htTouchpoints://uxdesign.cc/expectation-management-why-should-you-care-9af120bd1ec5. Accessed: 5.6.2021.

Lemon, K. & Verhoef, P. 2016. Understanding customer experience throughout the customer journey. Sage Journals. Thousand Oaks. Available at: https://journals.sagepub.com/doi/full/10.1509/jm.15.0420. Accessed 17.10.2021.

McNiff, J. 2013. Action research principles and practices. Routledge. Oxon. Available at: https://ebookcentral.proquest.com/lib/haaga/reader.action?docID=1143676. Accessed: 5.7.2021.

Mason, H. Mattin, D. Luthy M. & Dumitrescu, D. 2015. Beat accelerating customer exectations with trend-driven innovation. John Wiley & Sons. Hoboken. Available at: htTouchpoints://haaga-helia.finna.fi/Record/3amk.267019. Accessed 31.5.2021.

New Business Office. 2021. Toimintatapa. New Business Office. Available at: htTouchpoints://www.nbo.fi/toimintatapa. Accessed 22.8.2021.

Ojasalo, J. 2001. Managing customer expectations in professional services. Journal of service theory and practice, 11, 3, 200-210. Available at: https://www.researchgate.net/publication/235252675_Managing_customer_expectations_in_professional_services. Accessed: 15.11.2021.

Richardson, A. 2010a. Using customer journey maps to improve customer experience. Harvard Busines Review. Available at: htTouchpoints://hbr.org/2010/11/using-customer-journey-maps-to. Accessed: 28.4.2021.

Richardson, A. 2010b. Touchpoints bring the customer experience to life. Harvard Business Review. Available at: htTouchpoints://hbr.org/2010/12/touchpoints-bring-the-customer. Accessed: 28.4.2021.

Saunders, M. N. K., Lewis, P. & Thornhill, A. 2016. Research methods for business students. Pearson Education Limited. Harlow.

Sherman, J. 2019. Expectation management An inescapable challenge and the secret to a better life. Psychology Today. Sussex Publishers. New York. Available at: htTouchpoints://www.psychologytoday.com/us/blog/ambigamy/201903/expectation-management. Accessed: 5.6.2021.

Sheth, J. 1996. A Framework For Managing Customer Expectations. Available at: https://www.jagsheth.com/consumer-behavior/a-framework-for-managing-customer-expectations/. Accessed: 7.11.2021.

Starak, Y. 2021. The 5 Golden Rules Of Expectation Management And Why You Can't Ignore Them. Available at: htTouchpoints://yaro.blog/8750/expectation-management/. Accessed:5.6.2021.

Temkin, B. 2010. It's all about Your customers journey. Qualtrics XM Institute Available at: htTouchpoints://www.xminstitute.com/blog/all-about-customer-journeys/. Accessed: 29.4.2021.

Tight, M. 2017. Understanding Case Study Research: Small-scale research with meaning. Sage Publications, inc. California. Available at: https://methods-sagepub-com.ezproxy.haaga-helia.fi/book/understanding-case-study-research/i467.xml. Accessed 9.4.2022.

Vilkka, H. 2021. Tutki ja kehitä. PS-kustannus. Jyväskylä.

Villani, I. 2018. Transform customer experience. John Wiley & Sons, Inc. Hoboken. Available at: htTouchpoints://learning.oreilly.com/library/view/transform-customer-experience/9780730368366/title.xhtml. Accessed: 24.4.2021.

Wu, C. & Buyya, R. 2015. Cloud Data Centers and Cost Modeling. Elsevier B.V. Amsterdam. Available at: htTouchpoints://www.sciencedirect.com/topics/computer-science/expectation-management. Accessed: 5.6.2021.

Attachments

Appendix 1. Desired effect interview

Desired effect-interview of NBO Person on 6.5.2021.

Participating NBO person & Topi Reingoldt.

What are the issues to be solved through managing customer expectations?

- Prolonging average customership
- Customer satisfaction
- Increasing NPS-score
- Saving time not spent on correcting critical control points

What is the current state of Customer expectation management

- Senior manager and HR are contacting customers just to talk about their satisfaction levels and feelings
- Next step is using this voce of customer information for beneficial activities

In grand scheme, what other relevant functions not included in this agreed work are happening, that should be considered?

- None

Will this effectuation plan be directed to other operators than the current senior manager?

- Effects will be applied to all customer facing operators
- Effectuation plan in itself will only affect the senior manager

How is success measured?

- Customer retention
- Average lifecycle length of customership
- Volume of opportunities for added sales

Will validation be done by customers or inhouse?

- Inhouse by CEO decision

In your opinion, should the thesis produce the following:

- Process map of Customer expectation management. Yes
- Coaching guide for future Customer expectation management. No, description is enough
- Validation query for customers and/ or inhouse validation. Yes, inhouse
- Other material – Allocation of time expenditure in touchpoints if possible

Other notion

- Include SWOT or other analysis of Senior managers skill level and abilities

Appendix 2. Expectation starting point: interview with a partner.

Where does the current customer expectation start and who forms it?

Partner forms the current expectation through conversations and discussions with customers. Differentiation is made clear to avoid misconceptions associated with booking. It is underlined that this service is not booking, growth hacking or marketing. Professional profiling of service is communicated to customer, and skills of NBO staff to independently forward projects is showcased. The process is shown and explained to customers. Overall there are a lot of elements showcasing the uniqueness of the service by NBO, and Partner establishes a role as a leader and a guide to new business sales even before a contracts is signed. Service and even initial meetings are declined by NBO to prospective customers, if they do not match the required profile of NBO customers. This profiling is explained to people signing the contract, so difference to other new business management services should be clear.

In a later briefing of NBO by the customer, the NBO method of working is mirrored and suited to the customer company, reflecting preconceived notions by Partner. NBO does not set a range of goals or ideas, so that the customer cannot return to these. a wide range of possible results could be given, if the range was wide enough and NBO has expertise of the type of company dealt with. For example, organizational hit rate percentage can be told as an average statistic.

Do customers have preconceived expectations from former services that affect NBO?

If yes, it is often from booking. Some customers return to the results of booking services, and that is when NBO returns the conversation to quality of delivery. NBO delivery consists of qualified sales opportunities, not meetings. Some customers or their managers and directors ask after more meetings and compare NBO to booking even in a long sales relationship, where the metric should be all sales possibilities, not bare meetings where there might not even be any substance. It should be made abundantly clear that metrics used to measure the success of booking do not work with NBO, this is a continuous issue to tackle.

What are the customers expecting when the deal has been agreed upon?

They expect to be contacted quickly by the senior manager handling their case, or they will return to Partner for more clarification. They seem to expect rest of NBO to follow Partner leading and guiding style, and spokesmanship. Proposition is that customers expect the style that NBO engages its customers to be reflected in further conversation, and this is not often the case when briefing and workshopping. NBO could probably assume more and communicate customers responsibilities more clearly.

What happens with customer expectations between signing the deal and first workshops?

There is often a delay and customers contact Partner since nothing seems to happen. Senior managers should arrange a collaboration workshop and a kickoff, but Partner often arranges these. There should be more information available through inhouse briefing and hastier action toward customers after the signing of contract.

What hardships are faced with customer expectation?

Customers don't understand that they are also expected to deliver certain material. Often given material has not been read, and customers act like they would with booking services. Target listings are not made, or are only skimmed, and this delays the start of projects. Multiple times even shortlists of possible prospects are not delivered back to NBO, even when they have been provided to customer directly.

Customers who are surprised that they are asked questions about how NBO suits them, may disagree with some service specifics. For example a customer might say that managers are not relevant contacts, since they are often show-stoppers with deals, and only C-level decision makers should be contacted. This is contrary to NBO notions, that managers often hold vital information on important issues and that knowledge can later be used to leverage own position against competitors. This is the proven NBO model of work, and should be made clear to customers.

There is also often a gap between the signing of contract and initial briefings of NBO. Time is lost and details forgotten. There might also not be enough communication through NBO, and the customer might return to Partner who signed and forwarded the contract to the responsible senior manager.

Later on, the quality and roadmap of work that has been done is not clearly communicated. NBO drives the customer to look at numbers, when stories is where our exceptional skills shine. Numbers are important, but it takes time before customers investment is profitable, so numerical data should not be the initial measurement.

Appendix 3. Current viewpoints, action and ability analysis

Current viewpoints, action and ability analysis of Senior manager on 14.5.2021

This is an assessment of current taken action, their best practices, and challenges. The assessment also acts as a self-evaluation tool to map out and prioritize how much different touchpoints should be prioritized for advancement or need additional engagement. Personal viewpoints towards customer expectation management are addressed to be considered when developing action.

Viewpoints

State your current mentality towards customer expectation management in NBO, its benefits, challenges, and possibilities, and what do you consider customer expectation management to be.

- Benefits
  - Longevity and satisfaction
- Challenges
  - There is no singular or base-action model. expectations and style of their guidance are unknown, and effects are noticed too late. It is not known who should affect expectations, how and when.

- Possibilities
  - Higher customer retention and commitment. More open and detailed discussions. The actual creation of expectations from start.
- What is Customer expectation management
  - Understanding from both sides, what is being done, attained and aimed for. Understanding of requirements over time from both sides and what to prepare for, so work can be done in a smart and optimized way, according to customer expectations. Mirroring own work against expectations.

Current action

Fill in the following information into the squares:

1. What are the current touchpoints in the NBO customer journey map, where you manage customer expectation?
    - For example: initial meeting, one2one meeting, workshops etc.
2. What is the aim of taken action?
    - Get to know customer, set expectations, showcase success etc.
3. What is the channel of engagement?
    - call, email, meeting, videocall (VC) or other, what
4. Are the touchpoints engaged alone, with a team or with a singular senior or junior colleague?
5. In teamwork, do you take lead or support
6. What is the desired response from customer?
7. Do you feel you have all the necessary information and data to optimally manage this touchpoint?
    - If not, what is missing?
8. On a scale of 1 to 4, 1 being the lowest, rate your ability to manage customer expectation at this touchpoint?

Touchpoint	Aim of action	Channel	Team	Lead or support	desired outcome	Enough information?	Rate
Initial meeting of prospective customer	Generate interest	Live/ VC meeting	sales function & senior manager	support	Promise on a date of decision	No	2
Transition phase messaging	Raise % chance of signing a deal	Email/ phone	sales function or senior manager	Lead or Support	Customer voices increase in interest	No	2
Signing a deal, teaming, timeline	Agree on deal, Allocate team, create a roadmap	Live or VC meeting/ phone + email	sales function, senior manager, (CEO, SALES DIRECTOR)	Support	Sign deal, show interest in team, understand timeline	Yes	3
Comp. briefing for NBO lead & prospecting	Understand customer and goals, get prospects	Live or VC meeting	senior manager, CEO (support possible)	Lead	Feeling that NBO understood value in customers product. Customer buys prospect list from NBO	No	2
Starting Workshop	Learn how to communicate value for prospects, teach team.	Live or VC meeting	senior manager & NEW BUSINESS MANAGER. (Support possible)	Lead	Service is understood and feels valuable and unique	yes	4
First delivery & commentary	Proof of concept, fixing aim and targets	Live or VC meeting	senior manager, NEW BUSINESS MANAGER, (SALES DIRECTOR)	Lead	Things went as agreed- feeling or understanding what's wrong	No	2
Continued delivery, measurement, and adaptation	This is where value is generated, continuing action	Live or VC meeting + email	senior manager, NEW BUSINESS MANAGER	Lead	Satisfaction, ready to buy a new list or adapt to changes	No	2
Decision on continuance	Get customer to continue the deal	Any channel	Sales director, senior manager	Support	Customer decides to continue deal	Yes	4

Continued action and possible changes & upselling	Keep customer happy, upsell, adjust deal when necessary	Any and all channels	All	Lead or support	Satisfaction, buying inside sales service for more €. willing to adjust goals	Yes	3

Possible action

What additional action do you personally feel, if any, should be taken to advance CEX management? Please explain it the style of squares outlined before. (No comments)

- No comments or propositions

SWOT analysis

SWOT analysis is used here to find out and later cross-examine the possibilities and abilities to manage customer expectations.

Fill out the SWOT segments, considering strengths, weaknesses, opportunities and threats your management and leadership skills affect in expectation management for yourself, the customers and NBO. Focal customer is general customer, and no industry specific attributes are considered.

Self:

- S: Wide understanding and skillset for the role of CEX-manager
- W: Multiple customers, whose Customer expectation management is a daily task. Allocating time, when account management and Customer expectation management are not the only tasks
- O: More change to effectuate changes and major business. Shaping customer management according to own vision. Self-growth to desired direction
- T: 80% of customers are under 1 person, hasty management is a threat

Customers:

- S: Receive experienced contact-team lead who understands the big picture and has generated understanding from customer viewpoint. One clear channel of communication
- W: Customer expectation management takes time that need to allocated, but Customer expectation management when there is an issue, should happen immediately. Customer expectation management is not the main role of senior manager, so allocating correct resources for customer is hard.
- O: One person with wide experience makes cross-referencing possible, and offers possible viewpoints from different industries and projects
- T: There is not enough time to manage CEX for everyone. Not enough communication

NBO:

- S: Utilizing an experienced manager for CEX is an asset. Position makes CEX and customer experience management more agile and efficient, and offers more insight in time
- W: All knowhow is currently concentrated to 1-person, sudden changes can generate a threat. Account management model is not widely shared but shaped according to certain managers.
- O: Clear model of Customer expectation management can be measured and adapted to need. Makes NBO processes more adaptive and agile when CEX is managed properly. Partners resources and time is spent less on corrective action.
- T: Most customers are allocated as a responsibility for 1 person. NBO is personified to the customer through just 1 person vs. through CEO, sales director and team-levels

Appendix 4. Customer expectation management program with feedback

Customer expectation management touchpoint: Follow up sales function, Disperse and reset old experiences

Team engaging: Senior manager, alone
Channel of engagement: Call, followed by email
CEX-manager role: Leader in touchpoint
Customer expectation: NBO contacts customer and provides information on how to start
Customer expectation type before the program: Fuzzy

Necessary information for CEX management & effects of last touchpoint:
-Sales function must provide all knowledge on signed deal for SM.
-Sales function provides standardized data set to SM
-Sales function and SM should act in similar manner, guiding the customer.

Allocated Customer Journey Touchpoint: Transition

Aim of main action: Contact customer for the first time, make an impression

Desired main outcome: Customer is delighted for fast response, the handout from sales to account management is smooth and pleasant for customer.

Aim of CEX-management: Follow the **style** of sales function, guiding them through the process by asking for necessary information in an assuming manner. Assume Leadership in the partnership. **Disperse notions of booking and past experiences**, without discrediting them. Give the customer necessary tasks, so NBO can set some realistic expectations for the future.

Desired CEX outcome: Customer feels similarity in acting of different NBO personnel, and therefore safe. Customer understands that they have requirements in order for NBO to provide for them.

Touchpoint action description with build in CEX-management:
CEX-management in this TP is mainly keeping up with signing of the deal, and the way NBO works and to establish leadership. This helps set expectations in the longer timeframe. Customer is contacted by SM, after SF signs a deal with them, as. SM introduces themselves and sets up dates for necessary workshops, kick-offs, starts etc.

This is done as soon as possible from signing of the deal. After this point, same people are the ones setting dates so communication is easier, but transition without agreements between companies can cause distrust. As SF has already made a strong guiding impression, more of the same should follow. Set dates for meetings and tell the customer you will confirm these through e-mail. Also note customer that NBO will provide essential questions in the same e-mail, that are necessary to study the company’s processes, targets and products. After this, time can pass so the customer has something to do and is still thinking about NBO and does not arrive to the company briefing empty handed.

Previous rank of skill for SM: 2
Current rank of skill for SM: 3
Customer expectation type after the program: More precise
Customer expectation after the program: NBO will gather data on the company and form a sales plan for their services

Is there enough information now: The process is now clearer and timeframes are set to sales function and senior manager. To be honest this touchpoint could probably always be clearer and developed further, but the current situation and habits are working for new customers by creating a consistent totality.

What changed: The customer is now informed better and in a totally more consistent way. Sales function is anticipating deals to be closed soon and this allows the senior manager to concentrate more on planning the start in advance.

The process nowadays includes: 1. Sales function closing the deal 2. Sales function briefing SM and introducing SM to customers 3. SM contacting customer and scheduling workshop times 4. SM being in touch with customer through phone calls and emails, for instance by asking materials and arranging the start of the cooperation.

What was customer reception: Customer was happy to get a name and a face for his contact person. Their team sent a lot of materials in advance and understood the process before the workshops. They had a few questions that could go through in the phone call when scheduling the workshops.

How does this affect future CEX: The open discussion is started earlier. The transformation phase between the sales and SM is clearer. No need to think about how

and when to contact the customer: timeframes are clearer.
Recommended change for next time at this touchpoint: There is no reason to change anything, unless the rest of the process changes.

CEX-management touchpoint: Set realistic expectations

Team engaging: Senior manager, possibly new business managers on team
Channel of engagement: Meeting or video call
CEX-manager role: Lead conversation
Customer expectation: NBO provides an initial sales plan
Customer expectation type: Fuzzy

Necessary information for CEX management & effects of last touchpoint:
-Business critical information standardly gathered by NBO to suggest how to initiate the sales process should be attained and studied beforehand.
-Customers likely expect clear leadership and simple questions and suggestions. Still not completely understanding the whole process, guidance is necessary.

Allocated Customer Journey Touchpoint: Company briefing for NBO

Aim of main action: To gather information, understand what the customer wants, and how it can be delivered. Communicating the NBO process to customers and making them agree on working methods.

Desired main outcome: Customer understands the value in service and provides necessary information and tools for NBO to initiate working on the sales speech.

Aim of CEX-management: Take leadership in CEX-management, find out and set expectations and dismiss impossible ones kindly. Set metrics the customer is interested in.

Desired CEX outcome: Customer understands what can and should be expected, when and how. Customer is happy and in glad anticipation.

Touchpoint action description with build in CEX-management:
Touchpoint consists of going over the information provided to NBO by customer in previous touchpoints follow-up letter. More questions are asked as is necessary. Customers expect guidance and spokesmanship, so clearly communicating what NBO intends to do and why is crucial, to have customers agree or correct the methods. The differentiation in delivery over different timeframes is explained, and the reasons behind

the differences. This sets up the range of realistic expectations the customer should have on later delivery. This conversation is documented in a memo, to later quote what has been agreed on if necessary. Changes in aims and goals are later also written down. Spokesmanship is held by discussing in an assuming manner, creating confidence in NBO in the customer, and dissolving limitations they might otherwise impose, like only calling to chief executives of a company.!! Assuming and asking for corrections creates the expectation that NBO intends to excel in its own expertise and merits, and not just copy what could be done by the company themselves. Agree and write down what the customer wants to measure, for example: agreed meetings, organisational hit rate and how many prospects know the company.

Previous rank of skill for SM: 2
Current rank of skill for SM: 3
Customer expectation after the program: NBO understand the customers business benefits and can initiate sales for them. NBO provides better quality meetings than booking.
Customer expectations type after the program: More precise, at least partially explicit

Is there enough information now: Yes, although the customer keeps adding materials and information for us weekly through our weekly checks and according to our progression. In addition we gathered a lot of new information about booking and customers´ thoughts about their results versus NBO´s.

What changed: This step changed the process and my (SM´s) understanding of starting a cooperation in a more efficient way. This made me and the team to demand more from the customer in the beginning, instead of just trying to please the customer with poor materials and/or information. Also, discussing openly about our rivals (=past/current booking experiences) brings us together in a different way, by decreasing their possible fears about the number of monthly meetings.

What was customer reception: The customer obviously didn’t understand the point of sending several materials (for internal and external use) and going these through so clearly. This led to their history with booking. Although when we started to create more meetings and sales opportunities to them, they started to understand the meaning of going through materials and references / and customer cases in order to create a deeper understanding for NBO.

How does this affect future CEX: By having a deep understanding of who our customers are, what they do and what do they offer to their own customers, we become truly more customer centric, which hopefully enhances our customer satisfaction and enhance our work results.

Recommended change for next time at this touchpoint: The materials and going them trough with our customers should be a priority in our process. It helps the team to understand the base of our customers business and to create a closer relationship with the customers, by showing them that we are hoping their thrive as much as themselves.

CEX-management touchpoint: Remind of possible experience, share information with everyone and reinforce customer views of service

Team engaging: Senior manager and customer account team
Channel of engagement: Meeting or video meeting
CEX-manager role: Lead conversation
Customer expectation: NBO will have formed the sales plan and is ready to present it to customer company operators. Initial forecast of delivery (meetings) is high.
Customer expectation type: Partially implicit, can be explicit if dialogue has gone well. Customer has usually fuzzy expectations on how day-to-day communications are handled and what is demanded of them. Expectations on the quantity of delivery can be unrealistic.

Necessary information for CEX management & effects of last touchpoint:
-Documented data on what was agreed on the last touchpoint
-Documented process of intended action for customer
-Approximate information when a new target list is necessary
-Customer should remember what was agreed and expects the provided information to be distilled into an actionable form

Allocated Customer Journey Touchpoint: Workshop / Kick-off

Aim of main action: Prove that NBO has formed an actionable plan, and New Business Managers have understood it. <u>Repeat to customers what and when can be expected.</u>

Desired main outcome: Customer believes in NBO's ability to market their services and knows their own role in the future. <u>Customers have a reasonable range of expectations.</u>

Aim of CEX-management: Customers have realistic expectations and know their own role

Desired CEX outcome: Realistic expectations are set for the future, customer is happy that NBO has formed a viable action plan and method

Touchpoint action description with build in CEX-management:
NBO and customers meet up to go over the NBO action and method plan, and to reinforce the understanding what will be done and how. Formerly gathered data is went over again to ensure understanding of the complete starting point. Further weekly or monthly meetings are set to go over what has been accomplished. NBO team is introduced here, if not at the former touchpoint. New Business Managers show expertise by participating in the conversation by telling the plan or showcasing their former success with similar companies. This participation allows for easier takeover of spokesmanship for New Business Managers in the future.

Previous rank of skill for SM: 4
Current rank of skill for SM: 4
Customer expectation after the program: NBO starts the sales process and contacts customer when needed, and provides check-ins in order to validate day-to-day operations.
Customer expectation type after the program: More precise, more explicit, more realistic.

Is there enough information now: Yes. These changes and new information will create a solid base for future workshop/workshops. The main change in this touchpoint was that things were done quite similarly, but things set for the future (such as expected results, timeframes for certain advancements) are done earlier, in these workshops (vs. before they were done through the cooperation path and usually later on).

What changed: The information gathered and discussed in advance is now also handled in workshops / kick offs. Future actions are discussed and set in a more efficient way in workshops.

What was customer reception: Customer was engaged more in advance and it was easier to discuss together in workshops, as certain information (such as getting to know each other's, getting familiar with NBO:s concept, discussing materials and customer reference cases) had been gone through earlier.

How does this affect future CEX: The relationship is created already before and not later than during workshops and hopefully enhancing customer satisfaction and longevity in the long run.

Recommended change for next time at this touchpoint: None

CEX-management touchpoint: Validate method to prove & manage expectations

Team engaging: Senior manager and team
Channel of engagement: Meeting or video meeting
CEX-manager role: Lead conversation or pass leadership to Key Account Manager or New Business Manager
Customer expectation: NBO provides a report on initial action, success is already attained at some level.
Customer expectation type: Possibly unrealistic, fuzzy and implicit

Necessary information for CEX management & effects of last touchpoint:
-All data on what has been achieved or lost, how and why
-All data on intentions to follow up on what has been done

Allocated Customer Journey Touchpoint: First delivery-phase

Aim of main action: Prove that the NBO concept works, react to issues that need to be addressed.

Desired main outcome: Customer expectations are surpassed or met. Issues on delivery or methods of communication are addressed if necessary.

Aim of CEX-management: Prove that the concept works and delight the customer.

Desired CEX outcome: Customer is delighted and wants to continue as planned.

Touchpoint action description with build in CEX-management:
Companies meet, and all work that has been dome is went over. Quality, style and quantity of work is discussed and delivered results are discussed in detail. Further plans and prospects that are still worked upon are discussed and results theorized. Customers should be made to understand is this amount of delivery possible in the future, and what elements affect it. Different common and seasonal factors are also discussed to find trends in the customer company's products or service. Possible challenges are discussed, and options to overcome them presented to customer. Spokesmanship that has been taken in earlier touchpoints increases NBO's ability to believably ask customer to act in a certain way.

Previous rank of skill for SM: 2
Current rank of skill for SM: 4
Customer expectation type after the program: More realistic, implicit and precise
Customer expectation after the program: NBO provides successful delivery on their own forecasted terms

Is there enough information now: Yes, although all customer cases are different and might vary on occasion.

What changed: Weekly checks are arranged in advance and NBO is prepared with materials. The facts and expectations are discussed in advance. Scary scenarios are solved together. These all are planned and discussed right from the beginning. More specific targets are set and discussed through. Weekly targets are set together and customer is informed what is realistic to expect when starting the cooperation. The communication is better now already before so called "the check of first conversations".

What was customer reception: Customer was calmer and did not ask as many questions about open issues as he used to. Communication was ongoing and customer was following our work nearly real time through Dashboard, weekly checks and additional emails and phone calls.

How does this affect future CEX: NBO is leading the process in a more effective way. There is not so many misunderstandings and feelings of insecurity during the first delivery-phase, as targets are clear and the customer and its needs and hopes are heard.

Recommended change for next time at this touchpoint: -

CEX-management touchpoint: Continue to adapt, measure and explain changes

Team engaging: Senior manager, possibly customer account team
Channel of engagement: Meeting or video call
CEX-manager role: Lead conversation, make memos and pass information. Possibly facilitate change.
Customer expectation: NBO provides all information needed to continue, demands tools as needed, sets up meetings and provides successful delivery at a grooving rate.
Customer expectation type: Volume of desired delivery can be somewhat implicit and unrealistic. Expectations can be fuzzy, due to customer wishing more, but not communicating what they base this desire on.

Necessary information for CEX management & effects of last touchpoint:
-All agreed data from before
-All metrics and statistics on success in the past
-Plans to continue forwards and situation with the list of prospects

Allocated Customer Journey Touchpoint: Continued delivery-phase

Aim of main action: Keeping customer informed, acquiring or selling new prospect list, agreeing on coaching if necessary, handover of information, ensuring customer retention and satisfaction, adding or changing what is measured and agreeing on new services to sell if any..

Desired main outcome: Customer knows the complete situation with prospects, leads and sales, the cycle of partnership with NBO and is happy with the service.

Aim of CEX-management: Customer understands what can be expected now and in the future, and what does it demand from everyone.

Desired CEX outcome: Customer is happy with the service and knows when they should provide additional prospects to NBO. Customer knows when they have to decide on continuance of the trade deal.

Touchpoint action description with build in CEX-management:
Action in touchpoint is similar to the previous touchpoint. In continued delivery phase, internal auditing of success and communication becomes important, as customer expectations fluctuate according to different situations. When meeting customers in this

phase they should periodically be asked if they are happy with the results and what do they expect in the future. If customers expect something or want more, ask what these expectations are based on, write them down and discuss about their likelihood and possibilities and requirements for this. Set up and maintain measuring of different factors. Press customers for new prospect list, when necessary, but do this with plenty of time left to allow them to consider prospects. At this point, Key account manager or New Business Manager can gradually take over the weekly or monthly reporting, and Senior managers can focus on quality, expectation and experience management.

Previous rank of skill for SM: 2
Current rank of skill for SM: 4
Customer expectation type after the program: More realistic, precise and implicit.
Customer expectation after the program: NBO knows why, how and when their process works, and is not afraid to communicate hardships and provides solutions to them.

Is there enough information now: Yes, although all customer cases are different and might vary on occasion.

What changed: Weekly checks are arranged in advance and NBO is prepared with materials. The facts and expectations are discussed in advance. Scary scenarios are solved together. These all are planned and discussed right from the beginning. More specific targets are set and discussed through. Weekly targets are set together, and customer is informed what is realistic to expect when starting the cooperation. This is quite similar than the first delivery-phase.

What was customer reception: Customer was calmer and did not ask as many questions about open issues as he used to. Communication was ongoing and customer was following our work nearly real time through Dashboard, weekly checks and additional emails and phone calls.

How does this affect future CEX: NBO is leading the process in a more effective way. There is not so many misunderstandings and feelings of insecurity during the continued delivery-phase, as targets are clear and the customer and its needs and hopes are heard.

Recommended change for next time at this touchpoint: -

CEX-management touchpoint: Hard measurement and future expectations in the long run

Team engaging: Senior manager and sales director
Channel of engagement: Meeting or video call
CEX-manager role: Assist in conversation by providing facts of past action and success, set up Return of investment and one on one-meetings.
Customer expectation: NBO proves their process provides positive ROI, or vital business information for the future
Customer expectation type: Realistic, because they hold the sales numbers, sometimes fuzzy on how their numbers average against others, ROI expectations might be implicit, if not discussed beforehand.

Necessary information for CEX management & effects of last touchpoint:
-All data and information of the customer account, work and success
-Customers mood in the previous touchpoints greatly affects, how they approach NBO in this touchpoint.

Allocated Customer Journey Touchpoint: Decision on continuance

Aim of main action: Have customer continue dealing with NBO, have them recommend NBO on the company site

Desired main outcome: Customer is happy and wants to buy more resources from NBO, or invests in a more valuable service provided by NBO

Aim of CEX-management: Confirm success according to agreed upon metrics, set up future targets and expectations by quoting past success

Desired CEX outcome: Customer is happy and wants to buy more resources from NBO, or invests in a more valuable service provided by NBO

Touchpoint action description with build in CEX-management:
Expecting the decision on continuance, set up a ROI-interview with Sales Director. State what has been done to ensure positive results. Reference achievements on industry level if that is beneficial. When faced with criticism or negative feedback, lean to documentation on Service level agreements, action and statistics. Do not blame but check that customer has provided necessary support. Quote past targets and success on them, and set

expectations for the future, by continuing the service as is, or asking if the customers see value in buying more or more valuable resources from NBO. Record customer satisfaction on new metrics, and communicate these to account team.

Previous rank of skill for SM: 4
Current rank of skill for SM: 4
Customer expectation after program: NBO can provide more successful sales than competition or be more cost-effective than an inhouse team, or NBO will tell the customer what can be done to correct the previous action.
Customer expectation type after program: Realistic, precise and explicit

Is there enough information now: Yes

What changed: As SM participates to review-meeting, the first-hand information is now available for also to the sales team as well as for SM / NBM-team. There are no misunderstandings, as the SM (that also participates to previous (=all) touchpoints) is participating with sales. This decreases the chance of “Chinese whispers”.

What was customer reception: It was now easier to make the customer see set targets and results. Decision on continuance is now more easier and also clearer to make and the relationship was already very strong (thanks to enhanced CEX-management), so the conversation about continuing cooperation was only “a small touchpoint”.

How does this affect future CEX: Cooperation / project starts and also later conversations are clearer and SM´s role is permanent throughout the cooperation.

Recommended change for next time at this touchpoint: -

Appendix 5. Source material data

Mentioned item in source material					
Category: Action and skills from NBOs side	# of notions	Desired action interview	Partner interview	Current action and ability	Customer Journey Map
Unspesified action is taken	4	X	X	X	X
What NOT to expect is defined	3		X3		
Skillset is wide and high but unspesified	3			X3	
Expectation management started by Partner	2		X		X
There is not enough time to manage customer expectations at current workload	2			X2	
More assumptions could be made by NBO	2		X		X
Leadership by NBO is estabished	2		X		X
Meetings or video calls are the most usual channel	2			Almost always	X
Lack of data mirrors low skill level in engaging a customer	1			Always	
Role effects skill level in touchpoints	1			No	
Inhouse information moves too slow at the start from partner to senior manager	1		X		
Expectations NOT installed, by decision	1	X			
Quantity of work has more focus than quality	1		X		
High fluctuation in skill level	1			Extremely	
Category: NBO communication and understanding	Total notions	Desired action interview	Partner interview	Current action and ability	Customer Journey Map
Understanding of expectation management in principle exists	4	X	X	X	X
Service is communicated	2		X		X
Quality of NBO's work is not clearly communicated	2		X	X	
Wide market understanding is beneficial	1			X	
Account management model is not widely shared	1			X	
Clear and spesified models save time	1			X	
Validate inhouse, customer expectation management maturation is low	1				X
Category: NBO desire or expectation	Total notions	Desired action interview	Partner interview	Current action and ability	Customer Journey Map
Prolong customership	5	X3		X2	
Rise satisfaction	3	X		X	X
Avoid correctional action	2	X			X
Added sales desired	2	X			X
Increase NPS	1	X			
Rise voice of customer	1	X			
Creation of spesified progress for expectation management is wanted	1			X	
Desire to shape action by own vision	1			X	
Understanding when and where expectation management happens	1			X	
Category: Customer action, desires and expectations	Total notions	Desired action interview	Partner interview	Current action and ability	Customer Journey Map
Suspected, customers expect the same style of comms than they got from Partner	3		X3		
Customers want quick action from NBO	3		X3		
Customers often return to Partner	2		X2		
Suspected customer expectation	2		From booking		From Booking
Customers do not understand the need to collaborate from their part	1		X		
Customers think their understandin of buying is more relevant than NBOs	1		X		
Customers expect NBO to analyse them without their help	1		X		
Customers want more volume	1		X		
Customer goes through a range of emotions that wary a lot	1				Highly likely

Appendix 6. Data from expectation management program

Change in customer	Total notions	Transition	Company briefing	Workshop/ Kickoff	First delivery	Cont. Delivery	Decision on continuance
More precise exp	6	X	X	X	X	X	X
more exlicit exp	5		X	X	X	X	X
Customer is more happy with new model	5	X	X		X	X	X
more realistic exp	4			X	X	X	X
Data from customers is more easily and readily available	4	X	X		X	X	
Customers participate more willingly	4		X		X	X	X
Customer does what is asked, even when they dont understand why	1		X				
Customers give out more info, thereby easing exp. Management	1		X				
Less misunderstandings	1						X
Change in NBO	Total notions	Transition	Company briefing	Workshop/ Kickoff	First delivery	Cont. Delivery	Decision on continuance
Enough information available	6	X	X	X	X	X	X
Next steps clearer	5	X	X	X	X	X	
More communication from NBO	4			X	X	X	X
Rank of skill higher	4	X	X		X	X	
Rank of skill same	2			X			X
Less insecurities for NBO personnel	2					X	X
New possibilities and beneficial information recognized	1		X				
Change in Process	Total notions	Transition	Company briefing	Workshop/ Kickoff	First delivery	Cont. Delivery	Decision on continuance
Process is timed better	5	X3	X	X			
Process clearer to customer	5		X	X	X	X	X
Process is more efficient	4		X	X	X	X	
Expectations are discussed earlier than before	3			X	X	X	
Process clearer inhouse	3		X		X	X	
Negative scenarios are discussed	2				X	X	
Clear "allowed" expectations are communicated	1				X		
Improvement recommendations given	0						