

# The Customer Role in Agile Projects

## Workshop Position Paper:

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### ***The role of the customer on Agile software projects.***

The customer role is responsible for ensuring *the right thing gets built* by:

- Providing the vision that drives the product.
- Steering the project through numerous specific decisions about the sequence of work based on an understanding of the overall business benefit relative to the cost of each piece of work. This is an ongoing process that accounts for changes to the business over time.
- Describing the requirements clearly and succinctly, at just the right time, and in just the right level of detail.

The customer role is also responsible for assessing that the *thing was built right* by:

- Defining acceptance criteria / tests that drive product development
- Testing the delivered product.

In the past, the development team assumed many of these responsibilities themselves; often resulting in the wrong thing getting built, either because they had a poor understanding of the requirements or because feature sequencing was based on technical considerations rather than being aligned with corporate strategy or user need. Agile software approaches have highlighted the problems with the development team taking on these responsibilities, and suggest specific practices to be performed by one or more appropriate business/domain experts, for example: on-site customer to provide detailed requirements as needed, customer prioritizing the work sequence, customer defining acceptance tests, etc. While this realignment of the roles is a very positive development, these business experts are often not able to take on the tremendous responsibilities that are required of them. The customer needs much more assistance and support than they are getting!

### ***Personal Observations.***

I have been involved in fifteen XP projects since 2000, some of which also incorporated elements of Scrum. The projects have varied tremendously in size, complexity, criticality, duration, process purity, and outcome. In the cases where the customer didn't ask for help, or did not get the help they asked for, the experience was very stressful for them, and the outcome was far from ideal.

Because XP is pared down to three basic roles -- customer, developer, and coach -- my initial question in 2000 was: Is there still a place for the 'analyst' role? I have continued to ponder this question in the context of each project I've been on. Through this I have come to believe there is a definite role for a 'customer advocate', or 'customer coach'

which in many ways resembles many aspects of the traditional role of ‘analyst’ (minus the ‘analysis paralysis’ tendencies!). Three of my recent projects have included a specific analyst role, but did so more out of tradition than out of concern for the customer (and hence did not incorporate this additional role effectively). Many of the other projects would have benefited from including a customer advocate, and several of the small, simple ones had no need for one at all.

Some initial insights into the significant factors for successfully incorporating a customer advocate are:

- *Customer doesn't know how to prioritize the work properly.* Problems in this area pose great risks to the business success of the project. A business analyst can help facilitate the key decisions that drive the project forward successfully. A customer that is operationally experienced often has not had to think about big picture issues, and make business decisions about software projects. A business analyst can help them understand the big picture, map out a future mode of operation of business processes if necessary, and ultimately develop ways of associating business cost/benefit with the timing of different application features.
- *Customer cannot articulate requirements, envision an automated solution, and/or envision a future mode of operation.* In this situation, the customer definitely needs the help of a customer advocate to help them articulate their requirements clearly, logically, and consistently. A customer advocate can help the customer understand tradeoffs and consequences of specific decisions they are asked to make about system behaviour, look/feel, functionality, etc. Help is often required to guide the creation of relevant persistent requirements artefacts (yes, you often do need more than story cards and acceptance tests), in keeping with project needs and constraints.
- *Customer inexperienced in testing.* This is the area where the customer has been deficient in ALL projects I've been on. There are definitely considerations and skills that need to be brought to bear when creating acceptance tests, and special care must be taken when the tests are being automated. The customer often needs training and guidance in order for them to effectively perform ad-hoc, exploratory acceptance testing.
- *A combination of complex domain, small team and tight time lines.* I have seen this type of situation benefit from a customer advocate to ‘prime the requirements pump’. The customer advocate works with the customer to prepare an initial sketch of the requirements that are coming up one or two iterations into the future. The level of detail is ‘just enough’ required by the development team to quickly develop fairly accurate estimates during the iteration planning process. The pre-analysis also lets the developers hit the ground running when they start working on features; they will still have to fill in some gaps with the customer, but they are not spending significant chunks of their time gathering requirements before they can even get started.
- *Customer doesn't have time to devote to the project.* While this is definitely a red-flag for proceeding with the project, there are cases where risk is minimal for a customer advocate to act as a single point of contact with the customer, and thus become the customer proxy on the project.