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Dealing with change requests:
How to stay cool when the customer keeps asking for more

Hey there, customer change requests are a typical challenge of every project manager. Like many of you I've struggled with handling new requests in a good way. In this document I've summarized for you my top tips to help you lead a successful negotiation. If you have specific questions for your situation, email me at adrian@tacticalprojectmanager.com.

Adrian

Rule #1: Never say YES right away

Why?

First, the customer may not know exactly what he needs. Or what's good for him.

To quote Henry Ford, the car-maker: "Had I listened to the people, they would have asked for faster horses."

Second, the customer may exploit your weakness and will return with more and more requirements.

Rule #2: Always dig for the real need

Very often, there's a difference between what people *want* and what they *need*.

Example: The customers asks for "a report to show errors" in the new software system.

What he’s actually concerned about is errors, not the report. So instead of building an extra report you could ask yourself: how can we reduce the number of errors in the system and make the process more stable?

Check #1: Is the requirement really missing?

This one is very common in IT projects.

When replacing old systems with a new system, the new system is usually more powerful than its predecessor. The problem: The customer does not have the overview of the new functionality and so requires stuff that in fact is not needed.

Many of the tasks that had to be carried out manually before are now automated. Many of the issues that users struggled have been solved, due to smarter systems and more automation.

Therefore, the change the customer is requesting may just no longer be required.

Example 1: The customer tells you he needs to be able to edit his address on the invoice form. On the new system the address may be just printed automatically, making this additional step obsolete.

Example 2: The customer asks you to develop a “data check report” so he can find errors in the customer orders. In a new IT system there may be no need for such a report, because the system automatically corrects any errors or automatically notifies the user in case his intervention is required.

Check #2: Is the requirement really missing?

You might be surprised to hear this: It happened to me that a requirement that appeared to have been forgotten was in fact delivered. The reason: we had been sloppy with the description.

Example: The customer requested a “printout function for purchase orders“. Your

IT people had a technical perspective on it and called it “enhance printing interface for purchasing“. It’s the same thing, but with two different names.

Conclusion: Be very precise in your communication and ensure consistent naming.

Check #3: Does the requirement violate company or legal standards of any kind?

Once you have checked that it is a valid requirement, there may still be a reason why one would not just go ahead and implement the new requirement:

Sometimes employees ask for things which are in the grey zone or which are simply not allowed. Either because there is a company policy disapproving certain practices or because it’s not allowed by accounting or legal standards.

In one of my projects, a group of employees was asking for the possibility to change purchasing prices. This is a very sensitive topic and if you grant this right to too many people, you open the doors for fraud.

If there is any kind of financial risk or potential loss of knowledge involved, make sure you check with the respective department. This could be legal, accounting, HR or another department depending on the area.

Check #4: How urgent is it and does a suitable workaround exist?

These two questions must be answered in combination.

I recommend you schedule a meeting with the customer to clarify both points. To give the meeting proper weight I usually also invite the manager of the person who raised the request.

During the meeting, I let the customer explain again why they need the change.

Then I tell them: *We currently have no resources, but we'll see how we can fit it in. When do you need it latest? Can it wait until after [IMPORTANT MILESTONE]?*

The customer may respond with: We need it ASAP! We can't do our job without it!

In 90% of cases this is not true. But it's the typical bargaining that you are going to face in such situations. Don't make it too easy for the customer to get his "thing". Challenge him a little bit but always stay friendly.

If you need help with that, here are some scripts I use:

- *If this thing was so important, why was it forgotten in the first place?*
- *How often do you use/perform this process? (which requires the change)*
- *Tell me, how would it affect your business if the [CHANGE] was not implemented?*
- *I hope you have a good explanation when this point is addressed with the management!*

Check #5: Do you have available budget?

Lastly, you need to check if there's any budget left to accommodate the change request.