

# My Friend the Customer

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*Your customer must speak with one voice ...  
if that is not the case you will suffer  
Chet Hendrickson [2].*

## Abstract

*The Customer is the only non-developer role in eXtreme Programming (XP). The Customer's explicit responsibilities are to drive the project, providing project requirements (user stories) and quality control (acceptance testing). Unfortunately the customer must also shoulder a number of implicit responsibilities including liaison with external project stakeholders, especially project funders, clients, and end users, while maintaining the trust of both the development team and the wider business.*

*In this paper, we provide a small collection of patterns that describe useful models for the customer, showing how other roles involved in the process can be adapted to also serve as the XP customer.*

## Introduction

The initial description of Extreme Programming (XP) assumed an in-house project with an in-house customer, so that the goals and attitudes of customers and developers are closely aligned. Many projects are much more remote: often, developers never meet or speak to their actual customers, who may work for a different organisation in a different continent. Even the flagship C3 project failed because they were targeting the wrong customer in the end [2].

The Customer is the only non-developer role in eXtreme Programming . The Customer's explicit responsibilities are to drive the project, providing project requirements (user stories) and quality control (acceptance testing): unfortunately the customer must also shoulder a number of implicit responsibilities including liaison with external project stakeholders, especially project funders, clients, end users, and defending the project against office politics, while at the same time maintaining the trust of both the development team and the wider business environment.

The customer role is critical in making decisions about “what to build” and, in the minimalist philosophy of XP, the following are recommended for the customer role [6]:

- The customer is an integral part of the team and should be on-site with the team
- The customer writes user stories and then discusses each requirement directly with the programmers
- The customer is responsible for all business decisions including prioritising user story development
- The small 2-3 week iterations allow the customer to evolve their requirements based on concrete working software
- The customer regularly tests the software to confirm it works as expected.

XP explicitly assumes that the customer knows the domain well and is able to make decisions and as such does not provide ‘how-to’ advice on gathering, expressing and prioritising requirements.

In this paper we present several patterns that all address this general context, that identify several different ways of solving the same problem: how to find customers, especially for out-

of-house development projects, whether these projects are short-term contract developments, long term outsourcing, or some intermediate situation.

These patterns do not form a pattern language, rather, they may one day form part of a larger language collection describing outsourced Extreme Programming.

To save your time and our effort, we don't repeat the common context in each pattern. Rather, we begin by describing the cast of characters and forces involved in this problem, and then focus on the description of each pattern on the solutions each provides and how it resolves the forces present in common problem.

Each pattern contains a detailed example of an XP development project, generally constructed from several situations with which we are familiar. All these patterns are based on our observations of real projects. The examples we give reflect the key details, although names and details have been changed to protect the innocent.

## The Patterns

The patterns in this paper are as shown below. We believe you can guess the thrust of each from its name. These patterns were identified in our observations of real projects, where we found the customer role being played by someone with another role in the overall process, or played by someone taking on characteristics inspired by that other role.

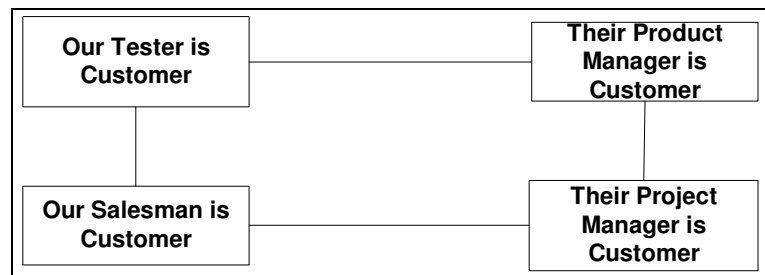


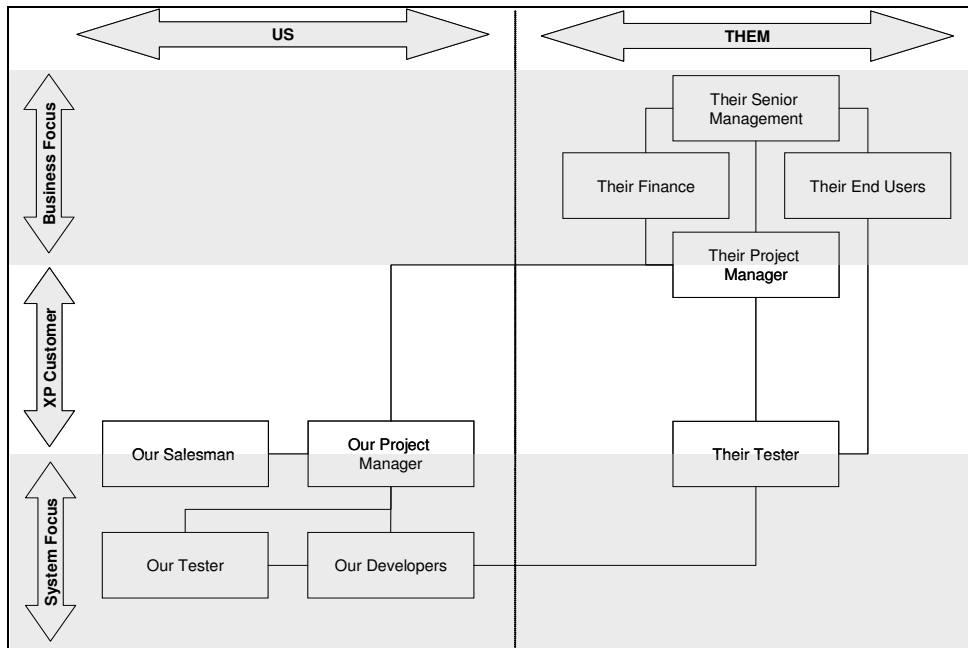
Figure 1: The Patterns

## Cast of Characters

The main categories of roles in our process are framed as follows:

- “us” a software development shop using Extreme Programming or other Agile practices.
- “them” the poor schmucks who not only need some software but are paying us to build it for them.
- “users” the even poorer schmucks who will end up having to use the software that we have written for them.

This is the language we hear listening to people working on projects: us and them, and users out there somewhere. The Customer is the crux of these patterns: the interface between “us” and “them”. Here we can typically identify several roles. Figure 2 shows the main roles, with lines showing typical communication between them.



**Figure 2: Key Project Roles**

**The Problem: the Customer Role**

The customer’s role in XP is [1]:

- To define the project goals (what constitutes success).
- To write and explain User Stories.
- To specify Functional Tests.
- To set priorities, and
- To view CRC sessions.

We can add some extra demands implied by the role:

- To ensure consensus of what will be considered success amongst the main interested parties (those providing finance, those responsible for managing the product). [2]
- To answer day-to-day and moment-by-moment questions by programmers on required functionality.
- To be a champion for the project, to ensure it keeps going regardless [3], and
- To coordinate releases with the requirements of the outside world.

This is a complex role. A candidate with the ability to do all of these things best will be trained as an administrator, as a tester, as a salesman, as an office politician, and as a software designer. It’s unlikely we can identify a perfect candidate for this; even if we could, the workload will be overwhelming [5].

So in the real world we’ll have to make do with a less than perfect solution, with someone with less than the ‘ideal customer’. The patterns in this paper explore the consequences of a variety of possible non-ideal candidates.

## Forces

Let's examine first the key forces involved – the main issues that constrain our choice of customer:

- *Risk of failure*: how likely the pattern is to cause the project as a whole to fail. Patterns that *resolve* this force make it more likely that the project will be completed to the satisfaction of everyone involved; patterns that expose this force make it more likely the project will suddenly, capriciously fail or be cancelled. Limiting this kind of risk is the motivation for much of XP: anything that interferes with the key XP practices is likely to increase this risk.
- *Development time*: how long a project takes. Patterns that resolve this force mean the project will finish sooner; those that expose this force make it more likely the project will take longer. Note that this is related to (but different to) forces listed below including like turnaround and feedback. All these forces are about time (or inversely, about speed): development time is about the length of a whole project, while turnaround and feedback are about the length of individual iterations.
- *Development cost*: how expensive it will be for a project to complete. Resolving this force makes things cheaper, exposing it makes it more expensive. Often correlated with development time. Costs can also be divided into those that they pay directly; those that we pay but that we charge them for, or those that we pay and cannot get back from them.
- *Development staff*: a major driver of development costs, patterns that expose this force require more staff to be assigned to the development, while resolving this force reduced the number of staff required. As with other forms of costs, this can include their staff, our staff that we change them for, or their staff that end up working for us or for the project without charging us.
- *Predictability*: Even more important for many customers than the actual cost is the predictability of costs: how easily you can guess the development time and development cost before you start work. Patterns that resolve this work make it easier to complete fixed-price contracts successfully; unfortunately they often decrease the flexibility, and overall cost and time of the development.
- *Flexibility*: how much they can change the scope or requirements of the project after we have started work on it. Patterns that resolve this force make it easier for them to make changes; patterns that expose this make it more difficult!
- *Turnaround*: how quickly we can turn their requirements into something they can complain about. Patterns that resolve this forces help us to get things to them faster (not necessarily finish the whole project faster – that's development time); Turnaround is about how fast we can go: in contrast to feedback, which is about how fast they can go.
- *Feedback*: how quickly they can tell us that the software we've built from them is crap. Resolving this force makes it easier for them to shout at us (considered a bad thing in traditional methodologies); exposing this force makes it harder for us to get shouted at (considered a bad thing in agile methodologies). We have separated turnaround, feedback, and availability because they often related to different aspects of a project. A good team may have high turnaround, producing things quickly, but low feedback, because the customer is unable to evaluate them quickly enough. A project's overall velocity will be a balance of feedback and turnaround.
- *Trust*: may seem like two forces: our trust – how much we trust them, and their trust, how much they trust us. Patterns that address one of these forces may (or may not)

also address the other! Success really requires both. Ideally, increasing turnaround and feedback will increase trust; but in toxic projects, the reverse could be the case!

- *Motivation*: how much their contact people care about the project. In a small scale, patterns that resolve this force make it more likely that they will provide us with feedback and availability.
- *Engagement*: how much their organisation is engaged with the project, on a large scale. In particular, patterns that resolve this force make it more likely that they will give us more money. The C3 project ended because different factions in the customer organisation disagreed on goals [2]; increasing the *engagement* of such factions would reduce the likelihood of this happening.
- *Sustainability*: whether the workload will burn out part of the project team. Again, this may apply to us (bad), to them (not so bad!) or to both (worst).

The importance of each force will depend significantly on the nature of the project. For example, in a two week project *trust* and *motivation* and *sustainability* will be less significant than in a five year one.

## Pattern: Our Tester is Customer

**Problem:** *How can you fill the XP customer role in a project that has a well-understood specification?*

### Example:

HaggisCorp, the famous Glaswegian software development house, has accepted a development contract with WurstMobil, the equally famous mid-European digital telephony multinational. This project, codenamed Offal, is to produce the SausageStack next-generation telecommunications framework for supporting MXT (multimedia messages, pronounced “mixed”) that will allow full-motion 3D videos to be sent as quickly and easily as today’s SMS. The MXT protocol has a full specification from international standards bodies (the 2 3/4 G specification association) and a reference implementation is available under a public licence. Both HaggisCorp and WurstMobil are keen to use Agile development techniques, however HaggisCorp are based in the fragrant, dank, dark early-19<sup>th</sup> century back streets of Glasgow, while WurstMobil are based in a fragrant, dank, dark, early-21<sup>st</sup> century skyscraper in Frankfurt.

### Forces:

- we want to minimise *risk of failure*
- we want to provide good *turnaround* and get good *feedback* to our programming team
- we want to keep the client *motivated* to provide us with important information about the project
- we want to ensure *sustainability*

**Therefore:** *Employ one of our testers to act as customer for the programming team.*

Our testers will have to understand exactly what the product does in order to write effective test specifications. They have a very clear ideal already, from the specifications they have. Moreover, they already need to liaise with the clients in considerable detail. So we make them the XP customer: testing is already their forte; priorities and specifications they can do.

### Forces Resolved:

Making our tester the customer reduces the *risk of failure*: testers are good people at avoiding the fatal errors, keeping everyone on the straight and narrow. It improves *turnaround* and *feedback* — testers are good at running tests and telling developers that their code is poor — after all, it’s their job. Testers are good at tracking the status of a project, improving *predictability*.

*Motivation* is improved: because they produce better software, understand bug requests and can ensure fixes are made, testers are good at ensuring the client organisation’s technical people think well of the project.

Microsoft has two testers per developer. Given a suitable number of testers, perhaps just one for a small XP project, this pattern can be quite *sustainable*.

**However:** making our tester the customer can increase *development time* and *development cost* — testers usually prefer correct software to somewhat buggy but cheaper software. We have to provide extra *development staff* as a direct cost to us. But many clients will understand the need to pay for testers, so we can often charge this cost back to them.

There’s not much *trust* — who trusts testers?

Most importantly, testers are unlikely to be good at *engaging* client organisation support for the project. Because they have no status within that organisation, this pattern greatly reduces

*flexibility* because they (and thus the whole team) will be working mainly from a static specification. In that situation, this pattern can be quite successful. On the other hand, this means that while *risk of failure* from detail issues will be avoided, it means that *risk of failure* from wider business issues may be increased.

**Example Resolved:**

Dougal McScroggin, a senior tester with HaggisCorp, was detailed to act as the customer for the Offal project. After some initial training (his personal instincts encouraged him to accept the completely non-functional first prototype to avoid spending any more of “his” development budget) this arrangement worked well.

For each iteration Dougal was able to develop acceptance tests based against the standard and the publicly released code, and eventually conducted interoperability tests with a competitor’s project released by TelecommSaussionne. Due to the diligence of the 2 3/4 G standards association, it was always clear to Dougal what the specification means and what the result should be.

During the project, Dougal and other staff from HaggisCorp visit Frankfurt twice to demonstrate intermediate results, and once again to deliver a the final software, and enjoy a trip to Munchen during Oktober.

## Pattern: Our Salesman is Customer

**Problem:** *How can you fill the XP customer role in a project with a very dynamic and changing specification?*

### Example:

SpivSoftware, a team of three developers based in lockup garage in Sarf London, has Terrence “Tel-Boy” Spiv as its founder, principal, director, CEO, and salesman. Because Tel-Boy plays many extreme sports – or at least has go-faster stripes, aftermarket mag wheels, and third-party led-enhanced rear spoiler on his purple BWM 318i – Tel-Boy was very interested in the idea of extreme programming. Furthermore, his latest project – a WAP based “magazine” subscription service to manage downloadable ring-tones and phone wallpaper to accompany the latest “UK PopStars” reality TV show – seems to fit really well with this paradigm.

But the TV project is commissioned by the “New Tory Brutalist” advertising agency Hirst & Emin, famous primarily for their slogan “take our money and do it!”. Hirst & Emin are philosophically opposed to playing any part in this project other than paying for it (oh, and perhaps using the results). Tel-Boy is concerned that it will be difficult to convince anyone from Hirst & Emin to play the role as an XP customer for this project.

### Forces:

- We want to control and *development costs* (and thus *development staff*).
- We want to keep the client organisation *engaged* (and thus paying us); yet the customer doesn’t have a lot of time or effort to devote to the project.
- We want to keep working at a *sustainable* pace and avoid burning people out.

**Therefore:** *Employ one of our salesman as customer for the development team.*

Given the dynamic nature of the requirements and the lack of a formal specification, we need a customer who’s really up to date with the exact current thinking within the customer. It can’t be someone within the customer; they don’t have the time or inclination. So the candidate XP Customer must be our person who interacts most with the real customer: our salesman.

### Consequences:

*Turnaround* and *feedback* from the development team’s perspective are good (assuming the salesman is around).

Salespeople are supposed to be professional at building up *trust* with their clients. They are an anecdotal reputation of being less effective at building *trust* with developers (see <http://dilbert.com>).

Salespeople are supposedly better at *engaging* with other organisations to help them spend their money.

**However:** There will be a higher *risk of failure*: Salespeople typically focus on getting the client to sign, and less concerned with delivery. We need more *development staff*, because we have to allocate a salespersons’ time, post-sale, to this project. That gives a higher *development cost*.

Salespeople are typically *motivated* by commission; without normal commission structures a salesman is unlikely to be well-*motivated* to this project. If they still have to do other sales simultaneously, then you’re probably asking for trouble. But, where salespeople have built up

a good relationship with their customers, and understand development's costs and timeframes, this pattern can work very well.

### **Example Resolved:**

After a couple of heavy Tuesday evenings down at the Old Bank of England on Fleet Street, Tel-Boy hit upon the idea of doing the job of XP customer himself. After all, he washes every day and drives a BWM, while the rest of SpivSoftware staff simply do not own enough Armani to talk to anyone from Hirst & Emin. This way, he could talk to Hirst & Emin, tell the developers what to do, and answer their questions.

And indeed, this seemed to work well. Hirst & Emin could just about bear to meet Del-Boy occasionally at exclusive London bars to talk about their "vision things". The design went well, especially the QuickTime VR images of PopStars pickled in formaldehyde. Upon delivery, Hirst & Emin promptly paid an inflated fee in a briefcase of five-pound notes – according to Emin, "to get that retro-sixties-Get-Carter, feel that was soooo 1999s Guy Ritchie". Del-Boy assumed that they were happy with the delivered product, or, as Hirst put it: "that's what we wanted all along. now shove(\*) off".

### **Discussion**

Typically the customer will interact most with two of our roles, the Salesman and the Project Manager. Much of the day-to-day communication with Them will fall to the Project Manager. So with this pattern, it becomes the responsibility of the Project Manager to ensure that the Salesman is kept 'in the loop'.

## Pattern: Our Product Manager is Customer

**Problem:** *How can you fill the XP customer role in a project with a rigorous but unwritten specification?*

**Example:**

GameCatz is an American company that makes electronic music production software. They use and produce open source software, and they were founded by hackers who created electronic music for free computer games. Their early hit was for the game nethack, where the music was based on electronic interference sounds made by cell phones.

The company still makes many products available free on the Internet. But in 1998 they were bought by the large distillery Dan Jackals, and they now focus on commercial clients in the growing convergence between computer games companies and the arms industry. They are starting a new project to create a completely new version of their flagship product: CatGutz. They have decided to use XP because they are trying to be seen as more professional, and XP appealed to their institutional culture favouring rapid response, and their devotion to anything called “extreme”.

They have rented a coach, and the developers have done a small internal pilot project to add electronic marching music generated automatically by web browsing, where the coach also played the customer role. They are now set for the CatGutz project, but are unsure who should be the customer.

**Forces:**

- we want *feedback* with good *turnaround* because we don't know what the users will accept .
- we want someone *motivated* to really make sure we deliver the right thing.
- we want someone with enough authority to allow us *flexibility*.
- we need to *trust* what they tell us, and trust their discretion about the implementation details.

**Therefore:** *Our product manager should act as the XP Customer for this project.*

If our management doesn't have a product manager, they should appoint one, and they should also be the on-site customer.

A product manager is distinct from a project manager. In a traditional management approach, a *project* manager manages the development effort and has a focus on *how*. But the traditional management approach also features a *product* manager with a focus on *what*: the finished product and its role. This is an especially important role when the product is being developed for many external clients, and even more potential clients: the product manager has the responsibility to make sure committed clients are satisfied, and that potential clients are likely to be satisfied too.

The product manager has a significant business responsibility, and the appropriate power, to make sure the product succeeds in the market. The product manager must therefore stay closely in touch with the users, and becomes critically aware of their needs. The job is to make sure the product is a success, so the product manager is motivated to tell the developers what the customers really need, and provide feedback with fast turnaround because they are in frequent contact with the users. The product manager is a significant player in the business, and everyone is familiar with this principle. They often also control the development budget; so can also allow flexibility, while also taking development time into consideration.

## Consequences:

*Motivation* is improved because the customer now has an institutionally supported personal stake in success. *Feedback* and *turnaround* are improved because the customer has all the right contacts to make this happen.

*Flexibility* is assisted because the customer has budgetary and institutional support to *put things right*. *Development time* will not blow out because budget overflows will adversely impact the customer.

**However:** *trust* may be problematic because a traditional source for product managers is the sales department, where they care little about implementation details.

## Example Resolved:

CatGutz is still a bit new to the corporate world and so they did not already have a formal product manager for CatGutz. They decide to appoint one, and select Clark Bruce. Bruce has been working for them as a mild-mannered marketing rep, and spends much of his time visiting computer games companies. Bruce originally worked at the games company himself as an engineer, and so he is familiar with many of the issues involved.

Bruce made sure when he accepted the position that it included oversight of the development budget, and management of the sales and marketing efforts for the product. He also asked for a larger salary, and a bonus package including a new Hummer and the necessary two parking places. GameCatz agreed to this, but only after making it clear that responsibility for the success of CatGutz was his; they also reminded him that their industry treats failures with eXtreme Prejudice (XP).

With his pride and prestige on the line, Bruce worked hard. He continued to visit the users in the games industry frequently, but also spent time with the developers every day. When they had questions about how realistic the musical screaming should be, his contacts in the games industry steered him right. When it became clear that the development was taking too long for the thunder claps keyed to the speed of player movement, he took responsibility for changing the budget. He made sure that the new Synth-of-Doom features were ready early, so he could give sneak previews to his most important users, to stop them from buying a competitive product (Microsoft Kill-Tunes) when it was released.

With all this, CatGutz was a success: the developers got what they needed, and Bruce got his Hummer. GameCatz also found that this approach also helped them in working with their parent company Dan Jackals, where product management had followed this path for many years.

## Pattern: Their Project Manager is Customer

**Problem:** *How do you manage projects with companies that outsource professionally?*

### Example

MegaCo are a large Dutch telecoms company. One of their many subsidiaries, MegaRude is a company that produces a product Bother\* (yes – even the names we first invented have been changed to avoid offence). Bother lives on a mobile phone, and speaks rude or amusing comments at random intervals to the user based on location, time of day, current world situation. It's proved very popular with a certain section of the population!

Unfortunately, Bother\* has become a victim of its own success: MegaRude now has a successful global franchise operation, and is busy signing up network operators in every market except Japan and the Deep South (apparently Bother is considered inappropriate there, for *cultural reasons*). This means MegaRude has a porting problem: Bother has to be ported to each new phone and network.

Luckily, Bother consists of a core component, the AnnoyEngine, developed by MegaRude, that can generate comments as PCM data given location and support for Internet requests. AnnoyEngine is written in C and is completely portable. But to support different hardware platforms, MegaRude have taken the decision to outsource all their software development to subcontractors who are specialists in each platform.

Since they run many outsourced projects, MegaRude have developed a structure geared to outsourcing. They have project managers for each project, and a large testing group with well-devised testing procedures and test scripts. After experience with undisciplined projects, they instruct their suppliers firmly to channel all communication and decisions through the project manager assigned to the project.

Allsorts Software is a small company contracted to port Bother\* to the new BuzzyPhone platform. Allsorts doesn't have enough staff to answer the phones reliably, let alone provide a customer; MegaRude's product manager oversees many different global ports of Bother\*. So, who should be the Customer for this project?

### Forces:

- They want *predictability*, with minimum *development cost* and *development time*.
- *Flexibility* is not a major issue for either them or us.
- We need to *trust* what they tell us, and trust their discretion about the implementation details.

**Therefore:** *Their project manager should act as the XP Customer for this project.*

As described in the **Our Product Manager is Customer** pattern, many development organisations maintain separate product and project managers. the *project* manager driving the development effort with a focus on process while the *product* manager concentrates on the finished product.

Because the project manager will be primarily responsible for a particular project (or set of small projects) they can make excellent XP Customers. Typically project managers can pass larger issues onto product managers for resolution. Especially important for XP, as project managers often have their own testing teams on projects, the Customer-side acceptance-testing role can be covered very covered.

### **Consequences:**

Their project manager is wholly responsible for changes that may affect costs, and will filter out expensive changes required by their product management, giving them their desired *predictability*, and reducing their *development cost* and *development time*. It's an approach that organisations of this kind understand well, so it's highly *sustainable*. The project manager champions the project within their organisation, improving *engagement*. Over time, a relationship can develop between their project manager and ours, increasing *trust*.

**However:** *Turnaround* and *feedback* are long; typically a week or more, especially when the project manager must to consult the product manager for a final ruling. *Flexibility* may also be considerably reduced, as project manager generally do not have much scope for make changes without deferring to product managers..

### **Example Resolved**

MegaRude assigned one of its highly experienced project managers, Drop van Zoutwinkel, to supervise the Allsorts port. Luckily, van Zoutwinkel had managed several similar ports before, and so he was able to answer many of the project team's questions immediately.

MegaRude trusted Zoutwinkel enough that he was allocated a contingency fund within the project time and cost budget. For example, late in the project, the Allsorts' internal testing discovered that the random number generator in the BuzzyPhone always returned the same constant result. Due to his position as project manager at MegaRude, van Zoutwinkel was instantly able to authorise an extra iteration to correct for this problem, especially when, in the middle of the crisis meeting every BuzzyPhone in the room announced in unison: "*Who's this then — my friend, the customer?*"

## Discussion: Using the Patterns

The patterns in this paper stem from our observations of XP projects. We have been studying the customer role, and have found it to be a challenging one. The customer role is critical to the success of an XP project, but we find that it requires an impressive individual, excellent communication links, and a lot of work.

We identified that one of the strategies being used in XP projects is for the customer role to be associated with an already established business role. This might mean that the customer role is actually performed by the person in this business role, or it might mean that a person playing the customer role takes the business role as inspiration. Our patterns can be used in either situation. There are probably also other role patterns for customers, but the four we discuss are the ones we have observed.

### Getting on with it

How do we actually make a particular pattern happen for us?

In practice it is the choice of the development team – in practice, probably, of the coach – and it will be severely constrained by the practical situation. Occasionally a project may try out more than one potential customer roles before finding what works best.

### Deciding which Pattern may work best

The many forces we identified show the complexity of the customer role. The different patterns we identify all manage forces differently, each according to the business issues of most concern to the traditional process roles that serve as a basis for the patterns.

For example, one of the key forces is simply the *risk of failure*. The pattern "Our Tester is Customer" positions the customer with the world-view of a tester. This means that preventing failure from the detail-level risks associated with technical problems is a key concern. The pattern "Our Salesman is Customer" has a very different world-view, and we would expect it to be more distant from the detail-level risks, but to have a greater focus on the immediate appeal of the project to potential clients. Similar to this is the pattern "Our Product Manager is Customer": like a salesman, a product manager is not concerned about the details; like a tester, a product manager does have to be concerned about quality, though with more emphasis on longer-term issues. The other side of this kind of picture is shown by "Their project manager is customer": the world view of a project manager is also about quality and the longer term, but with intent more custodial than entrepreneurial.

*Risk of failure* is an important force, but there are others. The analysis works in the same way. Each of the role patterns brings a particular view and focus for the customer, a different coherent set of emphases that can help a customer do their job.

This approach shows how a customer role pattern can be selected by an organisation. Every project is subject to many forces, and many different risks. But the main risks are often known. For example, it would often be possible to identify the greatest *risk of failure*, and choose a role pattern for the customer to best address that risk.

For situations that can be identified early, it may be possible to align the customer role with the pattern role, and so actually make, for example, the product manager also play the customer role. Where the situation is more dynamic, these patterns can also assist someone in the customer role, by suggesting the kind of role that can best address a particular set of circumstances. The key question is: *who do you need to be today?*

## Acknowledgements

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