Who Represents the Customer?

Idea In Short

Designate a customer representative who understands the users, can communicate their needs, and has access to the people who make business decisions. The representative should validate problems, clarify priorities, test proposed requirements, participate in evaluation, and help define acceptance and performance measures. This role does not replace the accountable business owner or procurement lead. Give the representative a clear remit, authority to gather input, and a route to resolve conflicting user needs. Keep users involved throughout delivery so the selected solution remains connected to the outcome it was meant to achieve.

Procurement decisions can become detached from the people who will use the product or service. A customer representative provides a practical link between user experience and the choices made during planning, sourcing, evaluation, and delivery. The acquisition.gov source material defines a team that begins with the customer and includes those who provide the goods and services. The broader lesson is that user insight should enter the process early and remain connected to decisions, while formal accountability stays with the designated business owner.

Define the representative's purpose

The representative helps the organization understand what users need and how they experience the current state. This may include collecting feedback, observing work, describing pain points, clarifying priorities, and testing whether proposed requirements reflect real use. The person should distinguish a business outcome from a favored feature. That distinction keeps the procurement open to different solutions.

The role is not simply to relay requests. The representative interprets evidence, surfaces differences among user groups, and explains the effect of trade-offs. They should be able to say which requirements are essential and which are preferences. The OECD's

Recommendation on Public Procurement emphasizes stakeholder participation, integration, and responsiveness throughout the procurement cycle. Customer representation makes this participation structured and linked to decisions.1

Choose a credible and connected person

Select someone with direct knowledge of users and the authority to engage them. The representative needs enough organizational credibility to present findings honestly, including inconvenient ones. They should understand the business context, communicate clearly, and have time to participate. A senior title alone does not guarantee proximity to the actual work.

For a large or diverse customer base, one person may not capture every perspective. Use a user panel, regional contacts, accessibility experts, or structured research, while naming a lead representative who synthesizes the input. Avoid relying only on the loudest or most senior user. The European Commission's ProcurCompEU competency framework includes stakeholder engagement and market analysis among the capabilities needed to design procurement strategies. These practices help teams gather user and supplier evidence systematically.2

Involve the representative before requirements harden

Customer input is most useful before the organization commits to a specification. Ask users to describe tasks, constraints, service expectations, accessibility needs, and failure consequences. Validate findings with data, observation, and more than one stakeholder group. Use prototypes or scenarios when users find it difficult to articulate needs abstractly.

The representative should work with technical and procurement specialists to translate findings into outcomes and testable requirements. If users ask for an existing product or brand, determine which underlying capability they need. If a process can be changed instead of purchasing a new tool, make that option visible. The World Bank's procurement planning guidance connects strategy with objectives, market research, context, and risk. User evidence is one of the inputs that makes a strategy fit its operating environment.3

Represent needs during evaluation

During evaluation, the representative can help assess whether proposals address user outcomes, workflows, service quality, and adoption needs. The role should follow the disclosed criteria and evaluation rules. The representative should not introduce unstated preferences or disregard evidence. If they have a conflict of interest or close supplier relationship, disclose it and follow the organization's safeguards.

The business owner remains accountable for the decision, and procurement manages the evaluation process. The representative contributes insight rather than making an unauthorized commitment. Record their input and how it informed the assessment. The Asian Development Bank's procurement planning guidance links strategy and planning to project objectives and fit-for-purpose methods; evaluation should preserve that connection between intended outcomes and proposed solutions.4

Connect user input to acceptance

The representative can help define how users will test deliverables and determine whether workflows are supported. Acceptance criteria should be clear, measurable, and agreed before delivery. The representative may coordinate user testing, collect defects, and recommend acceptance or remediation, while formal acceptance follows the assigned contract authority.

During implementation, users can identify issues that technical tests miss, such as confusing workflows or inaccessible features. Make a route for feedback and triage. Distinguish defects from requests for new scope, and route proposed changes through contract governance. The Government Functional Standard for Commercial describes business owners and contract managers as roles with different accountabilities across the lifecycle. Organizations can use the same distinction to preserve clear responsibility from user input through contract action.5

Keep representation accountable

Set a clear remit, expected time commitment, access to users, and escalation path. The representative should document input and explain how they formed conclusions. Review whether users' needs were accurately represented, whether trade-offs were transparent, and whether the delivered solution addressed the intended outcome.

UNCITRAL's Model Law on Public Procurement promotes participation, fairness, competition, and transparency in procurement systems. Although the model law is directed at public procurement frameworks, its emphasis on fair participation is a useful reminder that customer representation should be structured and traceable, not an informal privilege for selected voices.6

A customer representative gives user evidence a place in procurement decisions. Choose someone credible, involve them early, and maintain the role through evaluation and delivery. Keep their advice distinct from formal approval, and make sure a broad enough range of users is heard to support a sound result.

- 1Recommendation on Public Procurement
- 2ProcurCompEU: European Competency Framework
- 3Project Procurement Strategy for Development Guidance
- 4Strategic Procurement Planning
- 5Government Functional Standard GovS 008: Commercial
- 6UNCITRAL Model Law on Public Procurement

Summary

A customer representative is effective when the role carries genuine user insight into decisions and has a clear link to business accountability. The representative should translate user experience into evidence, help leaders make trade-offs, and remain involved as the solution is implemented. Define the role early and maintain it through acceptance and performance review.