**Initial Client Contact Assignment**

[team assignment – due before Sept. 15 at 5pm ET]

#### Objectives

* Introduce yourselves to your client.
* Request an initial meeting based on syllabus and team member availability.
* Establish lines of communication.

#### Background Information

Whether you are contacting a client provided by the instructional team or seeking help from an organization who can give you access to people for your own design challenge, professional communication is important. The first email will introduce your team to the client and requests an initial meeting.

#### Assignment

* Compose an initial mail to send to the client. Feel free to use the email below as a starting point.
  + If you have work experience in modern office contexts, you may want to allow less experienced team members to take the lead in drafting the email and then edit their work at the end.
* Send the email to the client, using a team member’s UMich email. Use your UMich email for all SI 501 client correspondence in the same way that if you were working for an organization, you would use the organizational email. **When you do this,** **CC your whole team *and* your GSI.**
* CC’ing your GSI counts as submission of this assignment.
* If you forget to CC your GSI, that’s OK. Just forward the email that you sent to your GSI. The important thing is that we know you sent it.
* If you do *not* receive a response within 48 hours, follow up with another email. If you don’t hear for another 48 hours, follow up with a phone call. Keep calling or emailing each business day after that.
* **If, after a period of one week after your initial email, you still have not received a response from the client, alert your GSI.** Much of the semester depends on timely interactions with your client, so it’s important for us to know if you have an unresponsive client.

#### Submission

* As above, your first email to the organization, with either your lead GSI on CC, or with the mail forwarded to your GSI afterward, counts as submission of the assignment.
* Send the email as early as you can in the week, but the hard deadline is by 5pm ET on Sept. 15 (Wed). Many teams are able to do this on day of Lecture when the assignment is announced.

#### Sample Email

Below is a sample email message for your initial client contact. Feel free to copy it and customize it for tone and content. (You have permission to use any text verbatim without citation or reference.) Some things to note:

* The level of formality is moderately high. Once you meet with your client, you can adjust for level of formality. In most consulting situations, you want to be a little more formal than the client and the standards of their workplace.
* Keep the main message short, so that your client is more likely to read and respond. Put any information that isn’t necessary for them to respond to below the signature.

**Subject:** [U-M SI501] Initial meeting to discuss SI 501 consulting project

Dear [Ms./Mr./Mx./Dr./Prof. XXX]:

Thank you for proposing a consulting project for the University of Michigan’s SI 501 class. Our team has chosen your project to work on for the semester.

We’d like to meet with you and learn more about the project you proposed. Could we meet at any of the following times…?

* [Date/time option 1]
* [Date/time option 2]
* [Date/time option 3]

We expect that this first meeting will last between 30-45 minutes. [Pick one of the following sentences: We would like to meet you in person at your workplace, if possible. We would like to meet you on Zoom, if that would be okay. We are open to meeting in person or in Zoom, though we have a preference for meeting in person.] More details are below.

We look forward to working with you!

Sincerely,

[List all team member names here.]

[Include your team name if you like.]

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Our goals for the meeting are to…

* meet you,
* agree on the scope of the project,
* go over the timeline for the semester,
* confirm the people we will interview over the next few weeks, and
* confirm how you would like us to share our end-of-term findings.

[Optional: Include brief bios of each team member.]

**Tips for Initial Client Meeting**

**Scheduling the meeting:**

* Aim to schedule the initial client meeting to occur by Oct. 1. Earlier is better! As late as Oct. 8 could work, but is not recommended.
* Plan for a 30- to 45-minute meeting, ideally with the entire team present. However, it’s better to have a meeting before Oct. 1 with some team members missing, than to insist on a date/time when everyone can attend. Use your judgment.

**Before the meeting:**

* Prepare for the meeting (see below). Agree on how you will introduce yourselves, and who will ask which questions. Give every team member a chance to interact directly with the client.
* You may want to agree on roles for the meeting – one person could be the meeting leader who opens and closes the meeting; another could be note taker; etc.
* Even though the meeting will happen over Zoom, plan to dress professionally. Also, clear your background of anything that might signal a lack of professionalism. If in doubt, err on the side of being more formal. Most working professionals are by now used to seeing the inside of others’ homes at this point, so you don’t have to go to extreme lengths for this. But for example, you don’t want to leave any underwear visible in your background.

**During the meeting:**

* **Engage with the client face-to-face.** Even on Zoom, give the client your full attention, unless you are the team note-taker.
* **Introduce yourselves**, UMSI, and SI 501.
* **Get a sense for the problem, and agree on the exact nature of the project scope.** Your primary tasks are understanding the issue; diagnosing the root challenges; and *recommending* solutions. In particular, be clear that you will not implement or prototype solutions, at least not during the course of the semester. (Some of you could continue a project as a volunteer or intern.)
* **Ask what their hopes are for the project.** This may be useful to know, even though you might have to temper their expectations as above.
* **Explain your methodology:** Contextual inquiry and qualitative analysis based on 6 or more interviews. Mentioning 6+ interviews will also help with scoping, as it gives clients a sense for how much data you will gather. Also, you are not required to do more than 6 interviews for the course – if any client demands more, and you are not interested in doing more, negotiate. Tell them that your instructor said that you should not *promise* to do more than 6, though you may be able to.
* **Explain that you will need at least three *types* of stakeholder groups to interview.** These should be three different types of people all of whom have some interaction with the client project/problem. For example: reference librarians, front-desk librarians, library volunteers; *or* managers, frontline employees, customers; *or* the director, HR staff, finance staff; *or* program staff, youth engaged in the program, parents.
* **Confirm or get interviewee contact information.** Do not leave without this information if at all possible.
  + Some clients will ask that you not contact interviewees until they say it’s OK. That’s fine, but then make sure to clarify by when that will happen, and how that will happen.
* **Describe the timeline overall.** The information that was previously sent to the client is below. Feel free to convey anything in the syllabus for more details.
  + Oct. 4 to Nov. 5: The student team will schedule and conduct interviews. (They will not reach out to interviewees until confirming them with you in the first meeting.)
  + Nov. 6 to Dec. 6: The student team will be analyzing interview data and compiling a report. They may reach out to you during this time to do a sanity check on their work.
  + Late Nov.-mid-Dec.: If you wish, the student team will present their results and recommendations to you and anyone you wish to invite.
  + Dec. 6 to Dec. 10: The team will submit their final report to you.
* **Ask for any relevant documents** for the project, background organizational information, etc.
* **Ask if, in addition to a written report, they would like you to deliver a presentation of your findings,** likely in mid-December. If yes, and it’s possible to schedule, schedule right away, so you can put it in your calendar. Otherwise, you can schedule in November by email.
* **Don’t commit to anything on the spot that you’re not sure about.** If in doubt, say “We’ll get back to you after consulting our instructors.” (Of course, then make sure to consult your instructors so you can get back to them.)

**After the meeting:**

* Let your GSI/professor know immediately, if you feel that something was off about the initial meeting – e.g., scope is too big or small; the client was hostile; the client didn’t think 6 interviews was possible; the client expects you to build their website; the client expects you to do quantitative data analysis; the client expects you to conduct a survey; something about the client’s tone was of concern, etc.
* **Send a thank-you email to the client contact** that includes confirmation about what you discussed at the meeting. Include any critical requests for the client, but keep the body before your signature short. Put all other details after your signature.