

Project Kick-off

Completed as a Team

Task #1: Obtain Access to Materials

If you are continuing an existing project make sure that you have access to all existing materials. Typically, all digital materials are in the GitHub repository and all physical materials are in a dedicated team locker (the TA/professor can provide you with the locker number and combination). One of the first priorities should be to replicate the work completed by the previous team by following the instructions provided on team's GitHub repository. The instructional video is usually a good place to start with to replicate their work. This takes time, which will vary team to team depending on how complicated the prior team's system is to replicate, as well as the quality of the documentation. It is critical to start this process early and ask questions if you run into roadblocks.

If this is a new project:

At this point, you haven't completed enough analysis to recommend specific parts and equipment. However, the professor or stakeholder might already know that you will need certain items. If this is known, make sure you determine a process for how to obtain these.

Design Lab Room: You can work in the design lab room, including off hours (8am to midnight). We will have parts and equipment in this space. It is the responsibility of the class to ensure this space remains secure. **Never prop open the door, double check that both doors are securely shut when leaving the room, and never allow anyone not in the design lab class into the space.**

Lockers: Each team will be given a locker to secure their team's work in the design lab room (EN-104). Talk with the professor to get access to your team's locker and don't forget the passcode provided to you.

Design Lab Computers: Some teams will need a dedicated workstation to run computationally intensive software or algorithms. Work with the professor if you need one of the machines available in the capstone room. If required for the project, we can reserve a dedicated PC that will be used solely by the team for the duration of the capstone project.

Task #2: Arrange a Kick-off Meeting with your Stakeholder(s) or Existing Student Team

After you have a discussion as a team, send an email to your stakeholder following the guidelines outlined below.

Professional Email / Scheduling Guidelines

An example professional email introducing yourselves to the stakeholder and getting the project started is shown below:

Example Kick-off Email: ([Download Here](#))

- **Identify a primary student point-of-contact:** This team member will be responsible for sending and receiving emails to/from the stakeholder (keep all other team members CCed on the email chain, so everyone is in the loop!). This simplifies the communication between parties and reduces the likelihood of confusion by having a single name that will be sending these messages.
- **Be professional!** Proofread your email. Be polite and enthusiastic about the project! You only get one change to make a first impression!

- **Give multiple options for meeting times:** Always give the stakeholder at least three options on dates/times to meet during core business hours (Monday – Friday, 9am – 5pm). This shows that you respect their time and do not just assume they will drop everything and/or rearrange their schedules to meet the time you suggest.
- **Always include an Agenda:** Make sure to always send an agenda for all meetings. As part of the agenda, you should include an item for anything that the stakeholder might want to add or discuss. This demonstrates that you are respect the stakeholder’s time, have clear goals that you wish to achieve by meeting, and that the meeting will not be a waste of the stakeholder’s time (they are often very busy).

Task #3: Preparing for your First Meeting

Send a Calendar Invite (this is critical!): Once a meeting time is confirmed, send the team including the stakeholder a calendar meeting invite, so it appears on their calendar. If you are meeting over Zoom (or another video conferencing service) make sure to include the log in information in the calendar invite.

- **Include an Agenda:** As stated before, you should send the agenda ahead of time. It is also recommended to put this in the outlook calendar meeting invite, so it is easy to reference before and during the meeting.
- **Take Notes:** Identify a team note taker that will jot down key points discussed during the meeting. It’s recommended to write these below each agenda item discussed. Upload the notes to a folder on your GitHub repository. These notes do not need to be long. However, it is important to document key points, especially decisions made and action items that need follow-up action. *(There is a natural tendency for people to think they will remember these details; however, people are busy, and this information will be lost if not written down).*

Task #4: Team Contract

Complete the team contract document that you can find on GitHub.

This documented defined team support roles, as well as agreed upon guidelines for handling team disputes.

What to Submit:

- Each person should individually document on how they contributed in their weekly inventor’s notebook submission.
- Post the completed team contract on GitHub under the *team_deliverables* folder
- Start getting into the habit of submitting your work on GitHub with weekly commits. This can include preliminary work, such as meeting notes etc...