Phase 2 Client Interview Script

This document has a script for the interview sessions you will be conducting during weeks 8 and 9 of the quarter. As the previous interviews, please conduct yourselves in a thoroughly professional manner at the interviews. When interviewing non-computer specialists, do not use computer jargon or highly technical terminology. Do use common sense interview skills, which include being prepared, polite, succinct, attentive, and thorough.

Interview Duration

The interview will be scheduled for 30 to 60 minutes, depending on client preferences. The interview is divided into four parts of 10 to 15 minutes each:

1. Demonstrate the prototype to the client.
2. Assist the client using the prototype.
3. Ask questions about product features.
4. Ask questions about product quality and adoptability.

Further details of these interview segments are presented below.

Participants

The interview teams will be comprised of two 402 students -- one from the requirements team and the other from the prototyping team. The prototyping team member will conduct parts 1 and 2 of the interview. The requirements team member will conduct parts 3 and 4. The interviewer who is not conducting a particular part of the interview will be the note taker and time keeper. The initial note taker (the requirements team member) will be in charge of starting the audio recording.

Starting the Session

Start by asking if it is OK to make an audio recording of the interview. Then, introduce yourselves, and say, once again, that we genuinely appreciate their time. Then summarize the four parts of the interview outlined above.

You can determine at the beginning of the interview which parts the client is interested in, and carry on with the interview accordingly. The options include:

- The client only wants a demonstration of the prototype, and will take it from there. In this case, only part 1 of the interview will take place, or possibly parts 1 and 2.
- The client wants a demo of the prototype, but does not need live assistance in using it. In this case, there is no part 2.
- The client is willing to answer our questions, and/or has questions of her or his own. In this case, parts 3 and 4 will commence.

Part 1 -- Demonstrating the Prototype to the Client

Ask the client for her or his Cal Poly user ID and create a Scheduling Tool workspace under that ID. Tell the client that this ID will create a private workspace for them to use to experiment with the prototype.

Walk through the prototype, on your own laptop preferably. If the client would very much prefer to have the walk-through done on her computer, do so. The prototype walk-through should follow the general script of the requirements walk-through, in this major order:

1. login
2. initial schedule creation and generation

3. viewing (in the one form currently available in the prototype, mentioning that the requirements slides illustrate three additional forms of viewing)
4. managing instructors
5. managing courses
6. managing locations

Part 2 -- Overseeing the Client Using the Prototype

With the client’s permission, show her how to access the prototype from her computer, and reiterate that there is a personalized workspace that has been created under the client’s Cal Poly computer ID. Then simply guide the client in using the prototype.

Part 3 -- Questions about Requirements Features

Start by asking the client if she has any specific questions about any aspect of the project. Discuss.

After the client-driven Q/A, there are two specific question areas we’re interested in:

1. The client’s reaction to the other forms of viewing the schedule.
2. The client’s reaction to the drag-and-drop schedule editing interface.

For question 1, show the three other forms of schedule viewing that are in the requirements walk-through. A handy way to do this is to put each screen in a browser tab, so that can be flipped between handily. You can do this quickly by right-clicking ’Open in New Tab’ on successive ’Next’ buttons in the walk-through slides.

For question 2, ask if the drag-and-drop editing looks useful and understandable. Also ask if the client can think of other ways useful to perform schedule creation and editing. In particular, ask about using an editable version of the other schedule views. E.g., in the schedule view with drop-down menus for each scheduled time slot, there could be an ’Add’, ’Edit’, ’Move’ items at the bottom of the drop down that provide editing functions in a form other than drag-and-drop.

Part 4 -- Qualitative Questions

Ask willing interviewees these questions:

1. Are there any missing features in what you have seen so far, that is features that you think are fundamentally important to the scheduling program?
2. Do you have any other questions that we have not yet covered?
3. Casually mention that we’ve been thinking about product names. Tell them the our top three or four candidate names and ask if they might have any opinions or suggestions. The candidates are "PolySched", "Tempus", "SchedIt", "Schedulus"
4. And the bottom line question: Assuming we deliver a product that’s reliable, and has the kind of features we’ve talked about today, do you realistically see yourself using it to do real scheduling? If not, what do we need to do to make it usable for you?

Interview Transcript

It is the job of the interview note taker to record a complete transcript of the interview. This includes all of the information provided by the clients, in answer to the interview questions. The transcripts are stored in the project repository, as described in the 308 Milestone2 writeup.

At the beginning of the transcript, record all of the following information:

- Time and Date of Interview:
- Name of Prototype Team Member:

- Name of Requirements Team Member:
- Name(s) of Attending Client(s):
- Location of Interview:

Subdivide the transcript into one section per each of the four parts of the interview. You do not need to record the questions themselves, if the content of the questions is essentially as given above. If any different questions are asked, record those questions in conjunction with the answers.

The default assumption for the transcript is that the designated question-asker interacts orally with the client(s). Hence, the name of the question-asker does not need to be noted in the body of the transcript. If the note taker asks questions, record these in the transcript.

If there is one client, the client's name does not need to be noted in the body of the transcript. If there are more than one client present, then note which client answers/asks which questions.

When the interview is concluded, be sure to download a copy of the audio file from the recorder via USB to a computer or USB stick of your convenience. For saving the audio file in the repository, store it in the directory `requirements/interviews/audio/`. The format of the audio root file name is the same as the transcript file, with an ".mp3" extension instead of ".html". I.e., the format is *name*`-`*date*`.mp3`, where *name* is the last name of the client and *date* is the date on which the interview was conducted. Use the date syntax described in the meeting minutes template.

Shortly after the interview is concluded, edit the transcript from its raw notes form to a finished document. As necessary, use the audio recording and your recollection of the discussion to fill in all of the details.