Spring 2012 Client Interview Script

This document has a script for the interview sessions you will be conducting during weeks 9 and 10 of of Spring quarter 2012. 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 one or two project team members. If possible, one of the two should be the person assigned the department being visited, per the assignment table here. This is not essential, but preferred, so that the interviewer is familiar with the kind of scheduling the department does. A two-person team is preferred, so that one person can be the primary interviewer and the other take notes.

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.

Part 1 -- Demonstrating the Prototype to the Client

Inform the client that the pre-defined user ID "admin" is used to perform department-wide scheduling. Explain that a future release will use Cal Poly CAS authentication, and provide the ability to define which users have administrative privileges.

If the interview location has a computer you can use, you can perform the demonstration on it. If not, use your own laptop. Explain that the actual installation of the program will be on department-controlled computers, one of which will hold the scheduling database. For the current demonstration, the software is installed on a Computer Science department machine, with separate web addresses for different departments.

The prototype walk-through should follow the general script of the acceptance testing. In particular, you should have pre-defined resource tables for the department you’re visiting. This way you will not need to spend a lot of time on repetitive data entry.

The prototype walk-through should follow the general script of the acceptance testing plan, in this major order:

1. login
2. create a new schedule
3. manage courses
4. manage instructors
5. manage locations

6. generate a schedule
7. edit the schedule
8. save and re-open
9. perform additional free-form operations, based on client interaction

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 department. 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 both the calendar and list views of the schedule. As the client if there are other forms of schedule view they might find useful.

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.

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. And the bottom line question: Assuming we could 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, in deployment/interviews/DEPT for DEPT equal to the name of the department interviewed. The format of the file names for the transcripts is *name-date*`.html`, where *name* is the last name of the client and *date* is the date on which the interview was conducted.

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

- Time and Date of Interview:
- Names of Team Members Attending:
- Names of Attending Clients:
- 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 `deployment/interviews/audio/`. The format of the audio root file name 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.