* ● Reflecting on your project experience, give examples where you can identify that you followed purchase of expertise, doctor patient, and where you used process consulting with the client. What were the results of each?
* - purchase of expertise (client knows what’s wrong, consultant does what client asks): Jon knows that his current manual entry system is efficient and prone to errors -> tells us to implement a scanning system b/c he didn’t have time to look for one himself. Us finding a new inventory tracking system that supported scanning.
* - doctor patient (we tell consultant the issues, consultant helps find out root problem and fixes it): Jon tested the sortly software and had issues with certain things. We explained how to do it, and he went back to the software and figured out how to fix it
* - process consulting (working together with the client): Setting up weekly meetings, created comparison analysis and he ultimately decided which one to move forward with, constantly iterating based on feedback of his needs (we would conduct more research based on him changing the requirements he wanted from the software).
* ● You are eating lunch with a colleague who shares with you a description of a consulting project he is working on. The colleague never worked with a client like you have in 373 and asks you what he should do. Give the colleague the steps to take, what to look for, how to determine the scope of work, how to organize the work, and how to prepare for the end of the consulting work. Based on your experience and class discussions, step them through the whole process.
* 1. go over general background information about the organization: what the organization does, goals, background information
* 2. Hold an initial meeting with the client and introduce yourselves, get to know each other as this will be important in building a close relationship
* 3. Ask the client what they’re struggling with, learn about the organization’s processes and technology to understand what issues are going on to find out the scope of work
* 4. Hold weekly stand up meetings going through everything you did during the week and go over future tasks that you plan to do in the upcoming week
* 5. Create meeting agendas, Take meeting notes and organize them for later reference
* 6. Organize completed tasks in folders for easy access, also makes it easy to build upon these tasks
* 7. Prepare for the end of consulting work by creating documentation/troubleshooting steps so the client is able to sustain the solution after the consulting project is over
* ● Given your class experience, what advice would you give to incoming students who will be working with a client in 373 next year?
* The first piece of advice I would give to incoming students is to truly understand the need of the client. As a consultant for a community partner, your role is to solve that client’s problem. In order to do so you must ensure you understand the problem and are well researched in the area your organization works within. Throughout our project, we spent the most of our weeks in what I would call the “research” phase. During this time we asked questions to our community partner about the organization itself, learned how to develop an inventory system from scratch, as well as analyzed existing software solutions. Once we had completed all this research we were able to present it to Jon (our community partner), which in turn led to him deciding our next step. Jon ended up deciding that he wanted a standalone, existing software. This decision narrowed our scope and we ended up creating an analysis document where we went into detail about the best possible inventory softwares. The fact that we were well researched facilitated the solution process. At the end of the day our research prompted a decision from Jon rather than us, which implies that he is going to be happy with the solution, since he chose it. The next piece of advice I would provide, is to explain to them the importance of maintaining a positive client relationship. For starters, the consulting experience is much more enjoyable if you like the client you are working with, as well as them liking you. We would start every meeting by just asking Jon how he is and inquiring about his non-work life. This lightened the mood which made the work related talk less boring. Furthermore, a positive client relationship entails constant communication with the client. Our group had weekly zoom meetings with our client, as well as constant email communication. Every time we spoke we would make sure to clarify any issues and update our solution based on what Jon wanted. Once again this ensures that the solution you are providing meets all the client requirements. Finally, I would tell them about the importance of teamwork. I had a great time working with my team and consider them good friends. We would complete all the assignments together which made it more fun and also resulted in efficient and better work.
* ● Provide three important considerations to keep in mind in terms of managing client relationships. Explain their importance and provide examples within your consulting experience where this consideration made a difference. Draw upon your experience and class discussions.
* 1. Weekly Meetings - this ensures that there is constant communication between the team and client which helps clear up any questions, resolve issues efficiently, and ensures that all parties are on the same page. This also strengthens the relationship between the client and team, allowing for a better work environment. Furthermore, it allows us to receive feedback on the work we do and iterate it to match client requirements.
* 2. Established Communication Pathways - We have established expectations for the methods of communication. This includes one person contact, email, Jon’s restricted working hours.
* 3. Building trust/good relations - Dedicated small talk at the beginning of every meeting. Completing our deliverables on time and up to the expectations of Jon ensures that we have good client relations.
* ● Assume you have graduated and have a great job. Your supervisor assigns you to a project. What are a few characteristics of the task that would flag for you that using process consulting would be a good choice?
* - No clear problem or solution to the task
* - The need for a sustainable solution
* - The client is not fully familiar with the subject area of the task
* ● What is capacity building? Give examples on how your team used capacity building in your project. What was successful? What was not successful?
* <https://docs.google.com/document/d/1SdXyXw1eGFqtuXFrKELW61Mm_XUyA19Wb7Rzzzb7EvY/edit#heading=h.69mw42cx0oud>
* <https://canvas.cmu.edu/courses/21734/pages/3-slash-17-communicating-to-a-non-technical-audience-sustainability-and-capacity-building?module_item_id=4696351> (slide 20ish)
* Capacity building - how you change company processes in technology (software), users, and infrastructure(organization)
* This outlines the hand-off process of the project and how Jon will be able to maintain it after we are done

**Project acceptance** - Having Jon approve a specific software and create an account for it. Asking higher-ups to approve using Sortly before buying subscription

**IT capacities**

Users - Documenting Sortly functionalities for Jon.

Development - Giving Jon access to the customer service people and handing him documentation. He maintains the system by being able to train other people.

Infrastructure - Asking Jon about the budget the organization has and ensuring our software solution falls within that budget so that they are able to continue paying for it.

* ● Define agile project management in your own words. In what ways was your team successful in maintaining agile project management? In what ways did the team rely on ad-hoc or no project management. Where did your project management work well, and where did you run into problems?
* Agile project management is the process of constant evolution of practices and solution development as the client needs change. The main concept of agile development is to iteratively and incrementally deliver requirements by breaking down large tasks into small components which are completed in short life cycles. Throughout our project we employed the breakdown aspect of the sprint. For every assignment we had, whether it was sprint reports, deliverables, or even presentations with our clients our group would break down the assignment and split the work. For example in the sprint report, I would usually deal with the detailing the past tasks, Blythe would focus on upcoming tasks, and Shalini would focus on client relationships and blocks and problems. Furthermore, we would iteratively modify our design based on what Jon wanted. Throughout the entire process one of our “blocks and problems” was the fact that Jon would constantly change his mind on certain functionalities he wanted in the software. This at times made it very difficult to pinpoint exactly what he expected in the software. In order to combat this, we needed to. As he changed his requirements we were sure to stay flexible. Eventually we pinpointed his exact needs and chose the software based on these.
* We relied on no project management when researching external foodbanks. Since a lot of these organizations were not quick at replying, we did not have a set plan on which food banks to reach out to and just went about our own methods on gaining insight.
* Our project management worked well when picking out a

* ● Finally, be aware of the content of all class lectures. In preparation for the exam, you should ask: "Why and how was this pertinent to my project and/or my professional career?"

Early in the semester we discussed relationship management, and more recently we discussed ways of documenting outcomes. In light of these discussions, and in terms of your team's experience, give one significant outcome of your consulting engagement in which ***trust*** played a positive or negative critical role with your community partner. Describe the outcome and how it was affected by ***trust***.

Trusted us to use sortly without him ever even using it ourselves

Due to the extensive research we did

As well as trust we established with him across the semester

Describe three specific actions you would take regarding ***trust*** when approaching a future client engagement?

Setting aside first meeting for getting to know each other establish personal connection

Open communication pathways so they always have a method of reaching you

Establish common ground

Weekly meeting so that you can have a guaranteed time devoted to them

Regarding the ***technology*** aspect of capacity building, what specific actions did your team do to build ***technology*** capacity and at what points during the project lifecycle?

We wrote documentation for Jon and any other future employees to refer to use it

Setting up the system in general by inputting sortly inventory

How could someone assess your outcomes again 12 months from now to determine whether that ***technology*** capacity has been sustained? Else describe why, in your client engagement, there is not any sustainable ***technology*** capacity.

Look if inventory software still intact

Measure metrics to see how long it takes someone to do something

See if anyone else is trained

Identify one risk to the project that arose during the semester and describe what you personally did to mitigate the risk. How can you use this experience to anticipate and manage risks in future projects?

Jon wouldn’t settle on specific needs he needed for the project

No matter what software we found the desired functionality were not possible

Once we found the software it wouldn't have the functionalities we needed

If Jon is no longer with the organization then they are screwed.