Vanier College
Continuing Education

05 Client Interviews

System Development

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Challenges in Client Communication

Effective client communication is critical for project success, but it often comes with challenges. Understanding these challenges can help you navigate and resolve them smoothly.

We will first discuss some **common challenges in client communication** and strategies to overcome them.

Challenges in Client Communication: Challenge & Solution

Misunderstanding Requirements

- **Challenge**: Clients may have difficulty articulating their needs clearly, or the project team may misinterpret what the client wants. This can lead to mismatched expectations.
- **Solution**: Use open-ended questions to encourage clients to provide more detail. Summarize and confirm the understanding of requirements frequently, and use visual aids like mockups or flowcharts to clarify complex ideas.

Differing Communication Styles

- **Challenge**: Clients may have different communication preferences—some may prefer detailed reports, while others prefer short summaries or verbal updates.
- **Solution**: Early in the relationship, ask the client how they prefer to communicate (email, calls, reports). Tailor your approach based on their preferences to improve clarity and collaboration.

Challenges in Client Communication: Challenge & Solution

Misalignment of Expectations

- **Challenge**: Clients may have expectations regarding deliverables, timelines, or processes that differ from what the project team can realistically provide.
- **Solution**: Set expectations early and communicate openly about project limitations. Provide regular progress updates and highlight any risks or changes that may affect the project's outcome.

Emotional or Personal Communication Barriers

- **Challenge**: Sometimes clients may express frustration or dissatisfaction in emotionally charged ways, leading to difficult conversations.
- **Solution**: Stay professional and patient, focusing on the problem rather than emotions. Acknowledge their concerns and suggest constructive solutions. Reassure them that their feedback is valued and will be addressed.

Challenges in Client Communication: Challenge & Solution

Inconsistent Communication

- **Challenge**: Inconsistent communication can lead to confusion, especially in large or complex projects. The client may feel out of the loop, or important details may be missed.
- **Solution**: Establish a communication plan at the beginning of the project with regular updates, even if there's no major progress. Use tools like project management software to keep both the client and team informed.

Technical Jargon and Complexity

- **Challenge**: Clients may not understand technical terms or complex project details, which can lead to miscommunication.
- **Solution**: Simplify technical language and explain complex ideas in terms that are easy for non-technical clients to understand. Provide analogies or examples to help them grasp key concepts.

Client Interviews during Planning Phase

Disclaimer

The content in the next few slides is based on the assumption that this is a second meeting after Kickoff meeting.

In real world projects, there might be many such planning meetings and the format of those meetings may vary slightly, but We could use some of this information in all such planning meetings

What Happens in This Stage?

1. **Clarifying Requirements**:
   a. During the detailed interview, the project team gathers more specific and concrete details about what the system needs to do and how it should perform.
   b. Any ambiguities or vague high-level requirements are refined into actionable, detailed requirements.
2. **Identifying Gaps and Risks**:
   a. Through this process, potential risks, constraints, and gaps in the initial project plan may be identified.
   b. Addressing these during the requirement gathering process ensures the project scope is clear and achievable.
3. **Validating Assumptions**:
   a. Assumptions made during the high-level requirement gathering phase are validated, and the client confirms whether these assumptions are accurate or need to be modified.
4. **Preparing for the Next Phase**:
   a. The detailed requirements gathered from this session will serve as the foundation for the **Software Requirements Specification (SRS)**, which will be developed in the next **Analysis phase**.
   b. These requirements will be used to guide the design, development, and testing stages of the project.

Purpose of conducting the client interview / meeting

The purpose of this meeting is to dive deeper into the specific functional and non-functional requirements of the project. This will help refine and expand on the high-level requirements gathered during the kick-off meeting.

Suggested Length:

- **Duration**: 1.5 to 2 hours

Attendees

Client-Side:

- **Project Sponsor**: Senior decision-maker, responsible for overall project approval and budget.
- **Faculty Representatives**: End-users of the grading system (teachers, department heads).
- **Administrative Staff**: Representatives from the administration team who will use the system for generating reports and managing grades.
- **IT Team**: Technical representatives responsible for data security, system integration, and infrastructure.
- **Compliance/Legal Advisor** (optional): To provide input on data privacy and regulatory compliance.

Project Team:

- **Project Manager**: Leads the meeting, ensures the agenda is followed, and keeps the discussion focused.
- **Business Analyst**: Responsible for gathering detailed requirements and documenting them during the meeting.
- **Technical Lead**: Provides insights into the technical feasibility of requirements and potential challenges.
- **UX/UI Designer** (optional): Discusses user experience and interface design aspects.

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How to make an excellent welcome & introduction ?

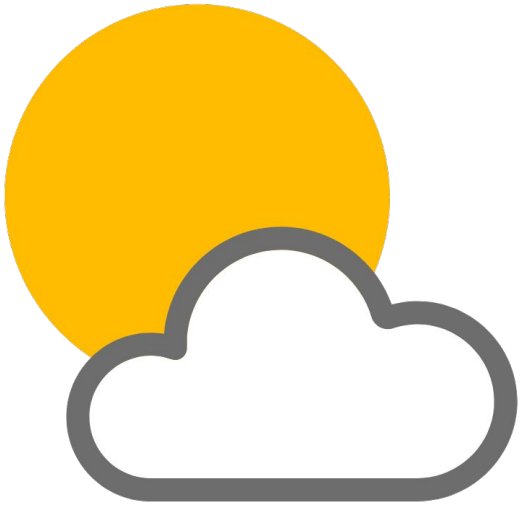
1. **Greeting**
2. **Weather Small Talk**
3. **Open-Ended Icebreakers**
4. **Transition to Business**

Introduction

1. **Greeting**:
   - **Example**: “Good morning/afternoon, everyone! Thank you for taking the time to meet today.”
   - Start with a friendly greeting and express appreciation for the client’s time.

   *Good morning, **Mr**. Alex, Thank-you for taking time for this meeting today!*

Introduction: Talk Weather



2. **Talk Weather:** If it's a virtual meeting or in-person, you can start with something light and friendly:
    - **Example**: “It’s been quite a chilly week here in [City], how’s the weather where you are?”
    - This can lead to a brief exchange that sets a comfortable tone for the rest of the meeting.

More Examples:

- We’ve had quite the weather lately! How has it been on your end?”
- It’s finally starting to warm up a bit, isn’t it? Have you had a chance to enjoy the sunshine?”
- “I heard it’s supposed to snow later this week. Are you a fan of snow, or do you prefer the warmer months?”
- “The weather’s been all over the place lately! What’s your favorite way to stay cozy during these cold days?”
- “It’s been a beautiful fall season so far. Do you enjoy the changing leaves, or is winter your season?”

Introduction: Icebreakers

Open-Ended Icebreakers

- After discussing the weather, you can ask an open-ended question that shows interest in the client's well-being:
  - **Example**: "How's everything going with your team this season? Any exciting changes?"
- This type of question encourages the client to share a bit about their recent experiences, helping to build rapport.

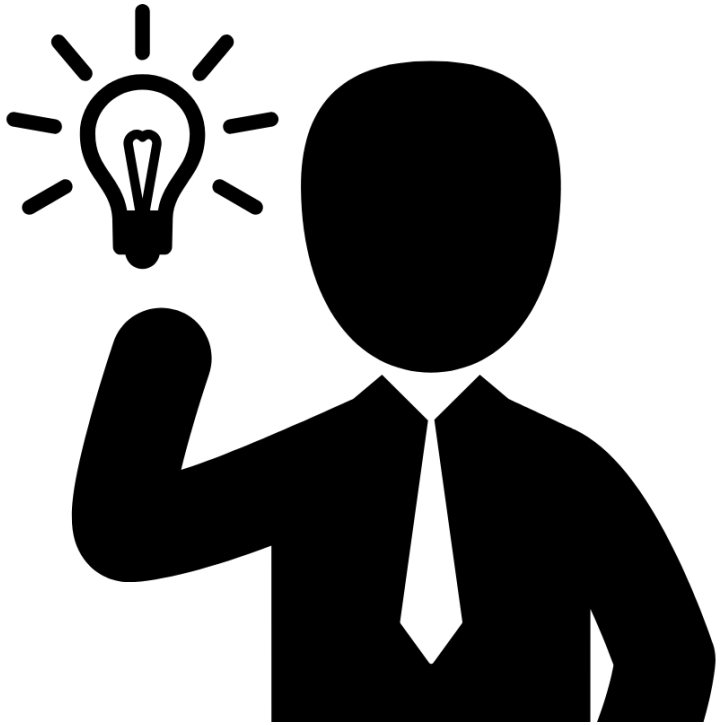
More Examples:

- **"How has your team been adjusting to the recent changes? Anything new on the horizon?"**
- **"How have things been going at your end? Any exciting projects you're working on lately?"**
- **"It's been a busy few months for everyone! How have things been on your side?"**
- **"How's the year shaping up for your team so far? Any goals or milestones you're particularly focused on?"**
- **"What's been keeping you busy these days? Anything interesting that you've been working on?"**
- **"How's everything going with your projects? Any challenges or successes worth celebrating?"**.
- **"I know everyone's been adapting a lot recently. How's your team holding up with everything?"**
- **"With the way things are evolving, how has your workflow been lately? Any changes in how you're approaching projects?"**
- **"It's always interesting to hear how teams are navigating these times. What's been working well for you and your team?"**
- **"How are you finding the balance between work and life these days? Has your routine changed much?"**

Introduction: Back to Business

Transition to Business:

- Once the conversation flows naturally, you can smoothly transition into the purpose of the meeting:
  - **Example**: “I’m glad we could connect today to discuss the project. We’re excited to get started on gathering the details of your requirements.”



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Recap of High Level Requirements

How to Summarize High Level Requirements from the previous meeting ?

1. **Review Meeting Notes**:
   a. Go through the minutes or notes from the previous meeting to identify key points.
   b. Focus on functional requirements and business objectives mentioned by the stakeholders.
2. **Group Requirements by Category**:
   a. Break down the requirements into logical categories such as **functionality**, **reporting**, **security**, and **user roles**.
   b. This makes it easier to present and ensure clarity.
3. **Simplify for Clarity**:
   a. Present the high-level requirements in simple, concise language that everyone can understand.
   b. Avoid getting into technical details; keep the focus on **what** the system will achieve.
4. **Check for Alignment**:
   a. Ensure that all stakeholders are still in agreement with the initial scope and high-level requirements.
   b. Ask for feedback or additional inputs to confirm alignment.

Recap of High Level Requirements: Example

So Based on our last discussion about our Grading Software in the Kickoff meeting, We identified following High Level Requirements

- **Grading Automation**:
  - The system should allow automatic grade calculations based on predefined grading criteria.
- **User Roles**:
  - The system should have different access levels for students, teachers, and administrators.
- **Reporting**:
  - The system should generate both standard and custom reports for tracking student performance.
- **Integration**:
  - The system should integrate with the existing Student Information System (SIS).

Next Step :Confirming High-Level Requirements

Ask the Team: "Are we aligned on these high-level requirements, or are there any adjustments or additional inputs?"

Clarify: Invite stakeholders to clarify any points of confusion or add any new requirements that have emerged since the last meeting.

Moving Forward to Detailed Requirements

- Having done a brief recap of High Level Requirements discussed in previous meetings, We now move to detailed requirements.
- Now that we've confirmed the high-level requirements, we can move on to gathering detailed requirements, and interviewing clients with functional and nonfunctional requirements.

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Functional Requirements:

Understanding Functional Requirements

Functional requirements specify **what the system should do**. These are the features, functions, and tasks the system must perform to meet the user's needs.

- **Examples**:
  - **Data Input**: "The system must allow faculty to enter student grades."
  - **Reports**: "The system must generate a report of student performance for each semester."
  - **User Roles**: "Different user roles must have varying levels of access to the system (e.g., student, faculty, admin)."

How to Ask Questions for Functional Requirements

1. **What are the core functions the system should perform?**
   a. Example: "What specific grading tasks must the system automate?"
2. **What types of users will interact with the system?**
   a. Example: "Who will be entering, modifying, and viewing grades in the system?"
3. **What reports or outputs are required from the system?**
   a. Example: "What kind of reports do administrators and faculty need to generate?"
4. **What is the flow of data within the system?**
   a. Example: "How should student data flow through the system from input to report generation?"

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What are Non-Functional Requirements?

Non-functional requirements specify **how the system performs** a function rather than what it does. They relate to performance, usability, security, and scalability.

Examples:

Performance: "The system should handle up to 10,000 concurrent users."

Security: "All user data must be encrypted according to industry standards."

Usability: "The system must be accessible for users with disabilities."

How to Ask Questions for Non-Functional Requirements

1. **What are your performance expectations for the system?**
   a. Example: "How quickly should the system respond to user inputs or generate reports?"
2. **What are the security requirements for handling sensitive data?**
   a. Example: "How should student grades be protected from unauthorized access?"
3. **How should the system handle scalability?**
   a. Example: "Will the system need to support additional users or schools in the future?"
4. **What are the system's usability and accessibility requirements?**
   a. Example: "Are there specific accessibility standards the system needs to comply with?"

Functional Vs Non Functional Requirements

Functional Requirements	Non-Functional Requirements
Describes what the system should do	Describes how the system should behave
Focuses on system functionalities (tasks, features)	Focuses on system qualities (performance, security, usability)
Example: “The system must allow grade entry”	Example: “The system must load within 2 seconds”

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Data and Integration Requirements (1)

1. **Data Types and Inputs**:
   - What types of data will the system capture and store?
   - What are the primary data points (e.g., grades, attendance, student profiles) that need to be tracked?
   - Are there any mandatory fields or data points that must always be included?
2. **Data Flow and Processes**:
   - How should data move through the system from input to final output?
   - Are there specific workflows for data entry, processing, and reporting?
   - What happens to data after it's processed (e.g., archived, deleted)?
3. **Data Entry and Validation**:
   - Will data be entered manually, or should it be pulled automatically from external sources?
   - Are there specific validation rules for the data (e.g., valid grade ranges, format checks)?
   - What should happen if invalid data is entered?

Data and Integration Requirements (2)

4. Data Access and Permissions:

- Who should have access to different types of data (e.g., student information, grades)?
- Are there specific data access rules based on user roles (e.g., teachers vs. admins)?
- Should access to certain data be restricted to specific users or groups?

5. Data Storage and Retention:

- How long should the data be stored in the system (e.g., semester, year, indefinitely)?
- Are there any legal or institutional requirements regarding data retention and deletion?
- What should happen to old data (e.g., archived, purged)?

6. Data Reporting and Output:

- What reports should the system generate using the data (e.g., grade reports, performance analytics)?
- How should reports be structured, and who should be able to generate them?
- Should there be custom reporting features where users can choose which data to include?

Data and Integration Requirements (3)

7. Data Integration:

- Does the system need to integrate with external systems (e.g., Student Information Systems, Learning Management Systems)?
- What types of data need to be exchanged between these systems and the grading system?
- How frequently should data be synchronized between systems?

8. Data Security and Privacy:

- What level of security is required for sensitive data like student grades?
- Are there any specific compliance requirements (e.g., FERPA, GDPR) that need to be considered?
- Should data be encrypted, and if so, what encryption standards should be used?

9. Data Backups and Recovery:

- How frequently should the system back up data (e.g., daily, weekly)?
- What should the recovery process look like in the event of data loss?
- Where should backups be stored (e.g., cloud, local server)?

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User Experience and Interface Design Questions

Questions about User Roles and Expectations

- **“Who are the primary users of the system, and what are their key tasks?”**
  - **Example**: "Teachers will enter and manage grades, students will view their performance, and admins will generate reports."
- **“How should the system support different user roles?”**
  - **Example**: "Should teachers and students have separate dashboards with specific features for their role?"

Navigation and Usability

- **“What tasks should be easiest to access on the main dashboard?”**
  - **Example**: "Should teachers be able to quickly access grade entry, or should reporting tools be prioritized?"
- **“How would you like users to navigate through the system—do you prefer drop-down menus, sidebars, or quick links?”**
  - **Example**: "Should reports be accessed through a top navigation bar or from the homepage dashboard?"
- **“Are there any specific workflows that should be streamlined for efficiency?”**
  - **Example**: "Should grade entry be a multi-step process, or can it be completed in one screen?"

User Experience and Interface Design Questions

Accessibility

- **“Should the system be designed to comply with any specific accessibility standards (e.g., WCAG)?”**
  - **Example**: "Do we need to ensure that users with disabilities can access the system through screen readers or keyboard-only navigation?"
- **“What accessibility features should the system include?”**
  - **Example**: "Should there be options for high contrast, text resizing, or alternative text for visual content?"

Visual Design and Layout

- **“Do you have any preferences regarding the system’s look and feel?”**
  - **Example**: "Should the design be minimal and clean, or do you prefer a more detailed, colorful layout?"
- **“How should data and information be displayed on the user’s dashboard?”**
  - **Example**: "Should teachers see a summary of student performance at a glance, or should they navigate to a separate page?"
- **“Are there any design elements that are particularly important to you (e.g., color scheme, branding, icons)?”**
  - **Example**: "Should the system reflect the institution’s branding, such as logos or color themes?"

User Experience and Interface Design Questions

Device and Platform Compatibility

- **“Which devices will users be primarily using to access the system (desktop, mobile, tablet)?”**
  - **Example**: "Do teachers typically use desktops in their offices, or should the system also be mobile-friendly for use on tablets?"
- **“Should the system be fully responsive to support mobile devices, or are there specific features that must work across all platforms?”**
  - **Example**: "Should users be able to enter grades via a mobile app, or will this mainly be done on desktops?"
- **“Is there a need for offline functionality in certain cases?”**
  - **Example**: "Should users be able to enter or view data offline and sync once they regain internet access?"

Feedback and Error Handling

- **“How should the system provide feedback to users when tasks are successfully completed?”**
  - **Example**: "Should a confirmation message or notification pop up after grades are successfully submitted?"
- **“What should happen if a user encounters an error (e.g., invalid data entry or system failure)?”**
  - **Example**: "Should users see a detailed error message explaining the issue, or would a simple notification be better?"
- **“How should the system handle input validation errors (e.g., grades entered outside allowed ranges)?”**
  - **Example**: "Should the system prevent submission of invalid data and guide users to correct the error?"

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Training, Support and Maintenance

1. Training Needs:

“What level of training do you expect for different user roles (e.g., teachers, students, admins)?”

- **Example**: "Should there be in-depth training for admins, while teachers and students receive more basic tutorials?"

2. Training Methods:

“What types of training materials or sessions do you prefer—online tutorials, in-person workshops, or user manuals?”

- **Example**: "Would you prefer video tutorials or written documentation for users to learn the system?"

3. Ongoing Support:

“What kind of ongoing support will be required after the system is launched (e.g., helpdesk, technical support, or regular updates)?”

- **Example**: "Should there be a dedicated support team to handle issues, or do you prefer self-service support options like a knowledge base?"

Training, Support and Maintenance

4. System Maintenance and Updates:

“How frequently should system updates and maintenance occur, and how should users be informed about changes or downtime?”

- **Example**: "Would you prefer monthly updates with scheduled maintenance windows, or should updates be less frequent but more comprehensive?"

5. Post-Launch Training and Support:

“Do you foresee any additional training needs after the initial launch, such as follow-up sessions or refresher courses?”

- **Example**: "Would it be helpful to have follow-up training a few months after launch to address any ongoing questions or new features?"

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Final Questions and Clarifications

By giving space for final questions and clarifications, you ensure that the client feels heard and that nothing important has been overlooked. This also sets the stage for smoother collaboration moving forward.

Final Questions and Clarifications

How to Phrase the Invitation for Final Questions:

- **Open-Ended Approach**:
  - “We’ve covered a lot of important details today. Before we conclude, are there any final questions or points you’d like to clarify?”
- **Prompt Specific Input**:
  - “Is there anything you’d like more clarification on, especially with regard to the system’s reporting features or user access controls?”
- **Check for Overlooked Areas**:
  - “Is there anything we haven’t discussed yet that you feel should be addressed before we move forward?”
- **Reassure the Client**:
  - “Please don’t hesitate to bring up any concerns you may have; this is the best time to ensure we’re all on the same page.”

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Next Step and Action Items

Be Specific: Make sure the next steps and action items are clearly defined and leave no room for confusion.

Set Realistic Timelines: Ensure that the deadlines you set are achievable and that both parties have enough time to complete their tasks.

Assign Responsibility: Make sure each action item is assigned to a specific person or team, so everyone knows who is accountable.

Invite Clarifications: Ensure the client has the chance to ask questions or make changes to the next steps, if needed.

Next Step and Action Items: Example Script

- **Summary**:
  - “Thank you for all the great input today. We’ve covered the high-level requirements, the key system functionalities, and user roles, which will help us create a strong foundation for the project.”
- **Next Steps**:
  - “The next step from here is for us to document everything we discussed today and prepare a detailed requirements document for your review. This will include the functional and non-functional requirements, along with any additional notes on user roles and reporting needs.”
- **Action Items**:
  - “On our side, we’ll be compiling the requirements and sending a draft document by 29 September.”
  - “On your side, we’ll need you to provide us with any existing system documentation or sample reports by 1 Oct 2024, so we can ensure the new system aligns with your current processes.”

Next Step and Action Items: Example Script

- **Timeline**:
  - “We’ll send you the document by Oct 3, 2024, and if you could provide feedback by Oct 10, 2024, that would help us stay on track for the project timeline.”
- **Follow-Up Meeting**:
  - “Once you’ve had a chance to review the document, let’s schedule a follow-up meeting to go over any updates or changes. Does 14 Oct, 2024 work for you?”
- **Final Check**:
  - “Does this timeline work for you, or are there any changes you’d like to suggest to the next steps or deadlines?”
- **Positive Conclusion**:
  - “Thanks again for all your valuable input today. We’re excited to continue working on this project and will keep you updated on our progress.”

Final Words: Examples

1.Final Words for Clear Conclusion:

- “Thank you for your valuable input today. We’ve covered a lot of ground, and it’s great to see we’re all aligned on the project’s direction. We’ll keep you updated as we move forward, and I’m confident this will be a successful collaboration.”

2. Final Words Reinforcing Next Steps:

- “It’s been a very productive meeting, and I appreciate your time and insights. As discussed, we’ll send over the requirements document by [specific date], and we’ll be looking forward to your feedback. Let’s keep the momentum going, and feel free to reach out if any questions come up.”

3. Final Words Expressing Excitement:

- “I really appreciate all the input you’ve provided today—it’s clear we’re building something that will truly meet your needs. We’re excited to take this project forward, and we’ll be in touch soon with the next steps. Thanks again for your time and collaboration.”

Final Words: Examples

4. Final Words Offering Ongoing Support:

- “Thank you for the productive discussion today. We’re here to support you throughout this project, so don’t hesitate to reach out if you have any further thoughts or questions. I’m looking forward to working together and keeping you updated at every stage.”

5. Final Words Emphasizing Teamwork:

- “It’s been a great session, and we’re excited to move forward based on today’s conversation. Your insights are invaluable to making sure we get this right. We’ll continue working closely together, and I’m looking forward to the next steps.”

Suggested Agenda:

Time	Agenda Item	Lead
9:00 AM	Welcome and Introductions	Project Manager
9:05 AM	Recap of High-Level Requirements	Business Analyst
9:15 AM	Functional Requirements Discussion	Business Analyst
9:45 AM	Non-Functional Requirements Discussion	Technical Lead
10:05 AM	Data and Integration Requirements	Technical Lead
10:20 AM	User Experience and Interface Design	UX/UI Designer
10:30 AM	Training, Support, and Maintenance	Project Manager
10:40 AM	Final Questions and Clarifications	Project Manager
10:50 AM	Next Steps and Action Items	Project Manager
11:00 AM	**End of Meeting**	

Thank You!