W Design
SI 501.003
October 7, 2019

Interview Protocol 1
Project Manager

Overarching question

How do you feel about the project managing workflow?

Introduction Script

My name is (   ), and this is my teammate (   ). We are team W Design. I will be responsible for asking questions and (   ) will take notes during our meeting. We'll begin by introducing you to our project and its scope. Our team is trying to enhance the workflow management. We want to interview you to understand your work so we can formulate methods to improve that process. We're interested in learning how your organization disseminates and collects information. We're also curious about the relationship between you and the tools you use to communicate with your team. We'll focus mostly on references to and creation of protocol documents, how people handle customer relationship management (CRM), and the overall workflow from system to system.

This interview should last roughly 60-90 minutes. During approximately the first half, we'll ask you some questions. Then, we hope that you'll walk us through your work, step by step. We're interviewing you because making field observations of your day-to-day activities is a great way for us to witness the nuances of your work. Many of the tasks you work on may be second nature to you, but for us it is very important that we see every step of the process. It may feel awkward at first, but we'd like to engage with you very closely while you're working, asking questions along the way.

A note on confidentiality: our discussion will be completely confidential. We also would like to record our conversation as a reference when we conduct analysis later on. It's only for this project and will not be shared beyond my team. Are you ok with that? Any recordings, note taking or audio, will be anonymized. If we use your insights in our final report, your name will not be used, nor will your role be mentioned. This interview is voluntary. If, at any time, you want to stop the interview, please tell me. Of course, there will be no consequences for this. Further, I can throw away any notes or recordings I may have taken up to the point of stopping.

Do you have any questions for me? All right, let's begin.

Key Questions

Responsibilities

1. How do you manage different teams in your daily work?

2. How does your role interact with the Director of Field Services and the VP?

Project Management

3. I'd like you to think back to the most recent project you worked on, can you tell me how you managed the most recent project?
    a. How did you make the process effective?

    b. How did you get everyone updated the last time you managed this project?

4. What are the tools you use to manage a team?
    a. What are your thoughts on the current tools for project management?
        i. If you feel bad about them, could you tell us what specific point that frustrated you?

        ii. What are the positive aspects of the current tools for project management?

        iii. Could you think of a few ways in which you would improve the situation?

5. About how many projects do you work on at once?
    a. How do you track each project to make sure they are all in good progress?

6. Were there any conflicts among projects? How would you manage them?

7. Can you talk about how you managed the schedule and budget of your last project?

Team Relation Management

8. Are the members on each project different? How do you manage the job role, skills and cooperation among these different people?

9. Can you talk about the last time that people on your team had problems with their work? What was the problem?

10. When people on your team have had problems with their work, how did you help them with the problem?

Additional Questions
1. Have you ever experienced any challenges or difficulties during your daily work?

2. Do you think there are ways that the workflow could be accomplished better?

Observations
Would you mind pretending that you were doing your daily work, and talking through what is going through your mind as you doing it? Tell me about what you're thinking, how you're feeling, and so on.

Conclusion
That concludes all of our questions for today. If you have any concerns or questions of your own, please feel free to email me at wdesign-si501@umich.edu. If we have any follow-up questions, we may reach back out to you via email. Once we've finished our report, we'll send it your way. Also, we will be presenting our findings at your office, so we look forward to seeing you then. Thank you again for your time!

Protocol 2
Director of Field Services

Overarching question

From the perspective of your role, where are the complications in workflow occuring?

Introduction Script

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Do you have any questions for me? All right, let's begin.

Key Questions

Responsibilities

1. Can you explain a basic workflow and also what your role is in that workflow?
   a. Thinking back on the last time you participated in this workflow, approximately how long did that workflow take?

2. How does your role interact or not interact with the PM and the VP?
   a. Reflecting on the last week or two, what was the frequency of your interaction with each role?

Your role as Director of Field Services

3. Can you tell me more about how your role updates protocols and documentation related to your work?

4. What does your interaction with your clients look like?

5. What are the services and products your role manages and provides on behalf of the company?

6. How do you measure the effectiveness of services you and your team are providing?

7. How did you communicate your feedback on managing client relationships with your colleagues?
   a. What was their reaction?

Interaction with the tool

8. Thinking back to the most recent project you have worked on, what kind of tools did you use to manage the project?
   a. Can you walk me through the whole process?

       b. How do you feel about the working process and the tool?
           i. If you feel bad about it, could you tell us what specific point frustrated you?

           ii. What are some things you find helpful about the tools?

           iii. Could you think of a few ways in which you would improve the situation?

9. Can you tell me how you used the tools you mentioned to keep track of the progress of projects?
    a. How did you keep everyone updated?

10. Can you talk about the last time that your team had problems with the tools during the process? What was the problem?
    a. How did you solve it?

Observations
Would you mind pretending that you were doing your daily work, and talking through what is going through your mind as you doing it? Tell me about what you're thinking, how you're feeling, and so on.

Conclusion Script
That concludes all of our questions for today. If you have any concerns or questions of your own, please feel free to email me at wdesign-si501@umich.edu. If we have any follow-up questions, we may reach back out to you via email. Once we've finished our report, we'll send it your way. Also, we will be presenting our findings at your office, so we look forward to seeing you then. Thank you again for your time!

Protocol 3
Vice President

Introduction Script

My name is (   ), and this is my teammate (   ). We are team W Design. I will be responsible for asking questions and (   ) will take notes during our meeting. We'll begin by introducing you to our project and its scope. Our team is trying to enhance the workflow management. We want to interview you to understand your work so we can formulate methods to improve that process. We're interested in how your organization disseminates and collects information. We're also curious about the relationship between you and the tools you use to communicate with your team. We'll focus mostly on references to and creation of protocol documents, how people handle customer relationship management (CRM), and the overall workflow from system to system.

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Do you have any questions for me? All right, let's begin.

Overarching question

How do you oversee the office workflow, and how do you maintain current updates with all of your colleagues?

Key Questions

Responsibilities

1. What is your main responsibility in the office?

2. How do you keep everyone aware of new initiatives, policies, or other organizational happenings?

3. How often are you engaging with stakeholders?
    a. How do you build relationships/connections with stakeholders?

    b. How do you maintain those relationships?

Project management

4. Who do you usually work with on a project?
    a. What does your communication with these people look like?
        i. Can you walk me through exactly what you do to relay information to and receive information from your team?

        ii. Has there ever been a time when communicating with your team or staying up to date was difficult? Why?
            1. can you tell me more about a specific time this happened?

5. How do you design or conceptualize new projects for the organization to take on?
    a. Can you walk me through the process of the last project or initiative you created?
        i. Do you normally work alone or with others?
            1. [for either answer] How does it feel like to work alone?/How does it feel to work with others?

            2. Are there any particular advantages or challenges when you work alone? / work with others?

6. What are some examples of specific projects you work on?
    a. Can you tell me about the most recent project you're working on now and how do you collaborate with other teams or assign tasks to them ?

Team relation management

7. Can you describe the management of workflow for yourself and your staff assigned to your team?

8. How do you feel during your workflows?
    a. are there some that you prefer? are there some that you don't prefer?
        i. what about those do you think is not/working?

9. How do you lead proposal process for new business opportunities?

10. How do you manage work plans and internal staffing?

Observations
Would you mind pretending that you were doing your daily work, and talking through what is going through your mind as you doing it? Tell me about what you're thinking, how you're feeling, and so on.

Conclusion Script
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