Client Meeting Protocol

The Capstone team is responsible for initiating and maintaining client contact throughout the project. You should generally try to schedule the first meeting with the client to include your faculty mentor and all team members.

The initial meeting with your client should clarify the problem and the desired project outcomes, and you should explore the ways in which your project fits into the larger context of the client's business goals. Some questions you might ask your client aim toward project definition and scope:

1. Are there any problems (e.g. tangible harms) the client is facing?
2. Has the client done any investigation into the cause?
3. What information, resources will the client be providing?
4. Who are the primary sources of information?
5. What output does the client expect?
6. What system, legal, resource, or other constraints does the client face?

Other questions involve learning the political issues of the project:

7. Have others taken steps previously to address this project?
8. Have other methods been used in the past?
9. Are there opinions or differences of opinions within the company?
10. What are the priorities?

Another full-team meeting should be scheduled to discuss the parameters of a formal memo of understanding with the client, possibly including the mentor. Confirm that the client understands key issues and expectations. Some questions you might ask include

1. Have we correctly identified the problem in the right context?
2. Are the scope and output what you needed and expected?
3. Are your responsibilities—including information release and costs—acceptable?
4. Is our timetable acceptable?
5. Are the project plan and methodology acceptable?

Interim and subsequent meetings will usually involve only those individuals who need to be present to accomplish the meeting purpose. Telephone or online meetings are often useful, and some teams provide regular written/email status reports to the client, either at or in lieu of regular meetings.

Teams should create meeting agendas, meeting minutes and client correspondence logs as appropriate. It is the team's responsibility to document the project goals, decisions, and work. The team's client, mentor, and the faculty are all stakeholders in the capstone process and should be copied on all meeting minutes if they request.

Business attire is expected! Casual (slacks or skirt and buttoned shirt) or informal (jacket and tie or hose) rather than formal (suit) is fine, but NOT denim, athletic shoes, polyester, or sandals. Please represent UNI professionally!