Stakeholder Interaction Guidelines and Closed Loop Communication

Instructions for using Template:

1. In the template below, the designated note taker should fill in all the necessary fields.
2. The Q&A section should be used as transcript to document the interview.
3. In the field which says summary; summarize all the important topics covered.
4. Communicate with the stakeholder either through phone, email or in person, and follow-up to ensure that you have accurately captured and interpreted his or her input.
5. The person editing this document should print and sign their name for authentication

Relevance: It is critical to communicate early and clearly with your stakeholder, and to follow-up and clarify information gathered from stakeholder interviews. The result is clear expectations on the parts of both the design team and the stakeholders.

Stakeholder Interaction Guidelines:

Preparation for an interview with stakeholders

1. Students should make an appointment with the stakeholders 3-7 business days prior to the intended day of the interview. Make use of faculty office hours where appropriate.
2. The team should discuss the aspects of the project they wish to address with each stakeholder – why do you want this person’s input?
3. These key areas or points should be summarized and emailed to the stakeholder at least a day before so at the interview the stakeholder would be prepared to answer the questions and will be able to give a valuable feedback.
4. Always mention the project name and most importantly “Senior Design or Design Project Management”, in the emails that are sent to the stakeholder.

At the interview

1. Students should be punctual since many stakeholders are busy which will lead to insufficient time to discuss about project requirements. Therefore being late will have an effect on the credibility of the team.
2. At the start greet the stakeholder and start the interview. Be polite and listen to the stakeholder’s feedback and make sure meeting minutes are taken with use of the Closed Loop Communication Template, since it will help the teams who will follow up on the project to get an understanding of what was discussed.
3. Once the interview is done ask the stakeholder for a feedback on how to make the project better.
4. Thank the stakeholder for the interview

After the interview

1. Convert individual bits of information gathered to your Affinity Diagram.
2. As a team, discuss and interpret the information gathered
3. Summarize your key findings
4. Send interpretation and summary of key findings to stakeholder for confirmation.
<table>
<thead>
<tr>
<th>Stakeholder Interview Template</th>
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</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
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<tr>
<td><strong>Start Time</strong></td>
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<tr>
<td><strong>End Time</strong></td>
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<tr>
<td><strong>Team Members</strong></td>
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Was a follow-up with the customer completed? (circle one)   YES   NO
If so,
Date: _______________ Time: _______________
Member who clarified the information:
How was it clarified: by phone_____ email_____ in-person_____ other___________
Signature: ___________________________
Summary: (summarize key findings from the interview in this space; please make sure to review with your team and the customer/stakeholder)
Interview Transcript:

Q: What do you think about the project description (Team will most likely be explaining this to customers)? Are there any areas you think we should focus our efforts, given the group breakdown? Can you think of any way this project might tie in with your work?

A:

Q: What products are available from Freescale for this project? Are there any issues with using microcontroller components made by other manufacturers in our project if Freescale is the sponsor?

A:

Q: How does accepting parts from a Freescale sponsorship affect our project’s budget? Will everything count towards the budget, or only materials, excluding tools?

A:

Q: Why do you think this product isn’t widely available? Do you think patent considerations for a modular version might be on the table?

A:

Q: When the ARM Day occurs, what are we expected to have as deliverable for Mr. Mastronardi? Are there any other significant dates you think we want to shoot for?

A:

Q: Who do you think may be good advisers to give reasonable metrics and specs for this project?

A:
Q: Will we be able to make instructions, designs, and code available to DIY hobbyists to construct? Are there any tools, materials, designs, or code libraries that we must avoid for legal reasons?

A:

Q: How can we constrain this project to make it a better fit for Imagine RIT and other demonstration events?

A:

Additional details: (other information, or information that is revealed during follow-up, if applicable)
Reflections:
Describe lessons learned related to the content of the interview, as well as the process
What a team should know after the customer interview

What
What is the project about? What is the problem we are trying to solve? How does the customer know it is a problem? How long has it been a problem? Is it a problem or is it an opportunity being pursued? What deliverable(s) does the client want – a product? Prototype? Process? Documentation? Data? Analysis? Model? Recommendation? Are there any pre-conceived notions about possible solutions – approaches that are expected, or others that are off-limits due to cost, technology limitations, timing? Any constraints?

Why
Why are we doing the project? If it is part of a faculty research effort, what is the motivation for the research? If it is part of an industry effort, does the client want to improve productivity? Safety? Quality? Demonstrate a device (or system) that could be commercialized?

When
Does the client have any key milestones that they hope to meet? Are there any time constraints? Are there any periods of time when the client is not available, or the work can’t proceed (e.g. a company that has a scheduled plant shutdown)? NOTE: per MSD guidelines, we hope the client has few or no timing constraints or expectations separate from the MSD timetable of events. How will the interaction with the client be managed – meetings? Emails? How often?

Who
Who is the client? (Note: the person who contacted RIT may not be the client). We need to know: Who approves the device? Who approves spending money during the project? Who will actually use the device? How many potential users are there? How many of that population is the team expected to connect with? What is the role of the team – design? Data collection? Fab? Test? Document? Project leader? All of the above?

How
In this first interview, certainly not all of the “how” questions will be asked and answered, but the team should walk away knowing if this is just a paper exercise, or if there will be a prototype, or a series of prototypes, what some of the key concerns are that the customer wants to see addressed through simulation or testing …..

Note: we should ask most or all of these questions, recognizing they may not all be answered in an initial meeting