

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