CHAPTER 18: CLIENT COMMUNICATION

Chapter outline

- When to communicate with clients
- What modes of communication to use
- How much to communicate
- How to benefit from client communication

Understanding your client for EDC will help you get your project off to a good start, avoid misunderstandings later on, and communicate effectively with him or her throughout. It is important to know that clients voluntarily submit project proposals and come from a variety of backgrounds and perspectives. While many clients are professionals in their own right, they bring with them diverse experiences, motives, and expectations. Some clients are readily available to their teams, while others—because they are out of town or have many demands on their time—may be less available. One client may have a fairly well developed design already in mind, whereas another may simply identify a problem without the technical knowledge to provide expert advice. While most projects are presented by individuals, in some cases a client represents an organization or business; therefore, several colleagues have a stake in project progress.

One implication of all this variety is that the kind of client you have in your second quarter of EDC may be quite different from the one you had first quarter. Another implication is that you need to understand your client in order to establish a good working relationship with him or her.

Because clients come from such different perspectives, one tool used to establish shared understanding at the initial meeting is the Client and Student Understandings form (downloadable from “EDC Documents” on the Blackboard website). Taking a few minutes to review this document with your client will help all involved to understand each other's roles through the duration of the project.

The most obvious reasons to maintain good communication with clients are to obtain information from them, such as user contacts and background material, to keep them apprised of your progress, and to solicit their feedback.

On the one hand, if you fail to keep your client posted on your activities, he or she may lose confidence in your abilities, and not devote the time to giving you help when you most need it. On the other hand, if you keep the lines of communication open, your client is likely to feel encouraged and enthusiastic about helping you. And at the end of the project, your client is likely to appreciate the research and thought that went into the final design and to be convinced of its success.

18.1 WHEN TO COMMUNICATE WITH CLIENTS

In the first quarter of EDC, your engineering instructor serves as the intermediary between you and the client. In the second quarter, however, your team is responsible for client communication.

How often should you contact your client? More often than you think. Students sometimes mistakenly believe that after conducting their initial interview, they don't need to contact the client until they have decided on their final design. This leaves clients wondering how, or even if, the project is progressing. To prevent this problem, ask your client at your initial interview how often he or she wants to hear from you. Some clients like to receive weekly email updates. Others prefer that you email them at key points in the project, such as when you've developed alternatives, completed user testing, and conducted your design review. Regular written communication with your client between face-to-face meetings (client interview, user testing, and final presentation) should prove effective.

18.2 WHAT MODES OF COMMUNICATION TO USE

Just as you need to be strategic about planning your final deliverables, you also need to be thoughtful and strategic about how to contact your client.

Your communication mode (or technology) will vary depending on your purpose.

18.2.1 Telephone

Call your client when you need a quick reply or want to set up a meeting. If a client can't meet with you face-to-face for the initial or subsequent interview, you may have to conduct it by phone.

As with all communications, plan your call. For example, if you're trying to set up a client meeting, team members should decide the purpose of the meeting and figure out when everyone can meet before you place the call. If you have to leave a message, give your name, section number, team number, and project; purpose of the call; phone number(s); and best times to reach you. **If you don't hear back by the next day, call again or send an email.** Your client may have forgotten to follow up or not gotten the message. Instructors don't want to hear that you called once but "never heard back."

After your phone conversation, send your client a brief email summarizing the main points you discussed (copy your instructors and teammates using the "cc" line of the email header). The email summary:

- Ensures that you and the client agree about what was discussed
- Keeps your teammates and instructors informed
- Documents what was discussed should questions later arise. For that reason, you should save all emails to and from your client in your project notebook.

Here is an example of an email sent to a client after a phone conversation (Sze, 2005). The subject line was "Confirmation of s15 Team 4 User Observation," and the message was copied to instructors and teammates.

Example 18.1: Email summary of phone conversation

Dear Mr. Duncan,

This email is to confirm the meeting we set up by phone today, which established that Team 4, which is working on games storage, will be at Evanston Township High School at 3 p.m., Monday, May 2, to do user observations. As a reminder, these are some of the tasks we will be working on:

- taking an inventory of the existing games
- measuring doorways and size of storage spaces
- measuring the various game pieces
- obtaining a list of the students and their disabilities so we can tailor the Storage Cart to their needs

We look forward to seeing you then.

Nicholas Sze
Section 15, Team 4
Games Storage Cart Project

18.2.2 Email

Use email when you don't need an immediate response, when you have had difficulty reaching the client by phone, or when you want to present information that would be hard to convey by phone. **Note:** Keep emails short so that they can be read with little or no scrolling. If you have a significant amount of information to convey, write it up as an attachment to a short email that briefly summarizes its purpose. Assign one team member to email your client throughout the project so that your client does not get confused by messages coming from different people on the team. When sending email it is customary to allow a few business days for a response; however, your client should establish a mutually agreed upon response time from the outset.

Chapter 19 explains how to write effective emails. In addition, you should review Chapter 17 for advice on planning your communications. Here are the key components of an email to your client:

- Subject line: Subject lines often determine whether someone will open your email. A good subject line should indicate precisely the purpose of your email, and identify your project, section, and team number. Rather than write “Meeting,” write “Meeting request--crochet hook project--Sec 14, Team 2.” If you find yourself writing several emails in a row to your client, don't keep using the original subject line. If you’re confirming a change in meeting time or place, for example, change your original heading, which may have been “Meeting request” to something like “Confirming new meeting time: Tuesday at 2 p.m.”
- cc line: Copy your instructors and fellow team members to keep them in the loop.
- Salutation: Begin your email with a polite salutation, such as “Dear Ms. Cohen” or “Dear Jonathan.” Don't use an overly informal opening, as in “Hey, Jon.”
- Introduction. Because your client may be working with several teams in more than one section, the first sentence of the introduction should state your section and team number, and the purpose of your email. For instance, an email written after an initial client interview might begin: “I am writing as a representative of EDC Team 2, Section 14, which is working on the adaptive crochet hook. We would like to thank you for speaking with us on January 18. This email summarizes our understanding of the major user groups and requirements of the project. If you would like to clarify anything or add information, please email me.”
- Conclusion: At or near the end, state your next step and what you would like your client to do. A conclusion might be worded like this: “Please call or email me (my contact information appears at the end of this message) if this summary of users and requirements is in any way incorrect or incomplete.” Your concluding paragraph should be upbeat: “We are excited about working on this project because it gives us an opportunity to improve the daily lives of stroke patients.”

18.2.3 Meetings

Schedule a meeting when you need substantial feedback from your client. If the meeting is your initial client interview, write an interview script, as discussed in Chapter 2. If you are meeting later in the quarter, prepare a detailed agenda that follows the format and guidelines discussed in Chapter 13. Also prepare visual aids—drawings, mockups, graphs, and charts—to bring with you. If you are conducting the meeting as a videoconference, fax or email these visual aids to your client beforehand.

Another good way to prepare for a client meeting is to anticipate questions your client will have (particularly about the reasoning behind your research methodology and design decisions) and answer these questions in your presentation, or be prepared to answer them if your client asks. Your project notebook is an invaluable source of information. **Always bring it to client meetings.**

As with telephone conversations, send your client a brief email after the meeting, summarizing the main points. Copy your teammates and instructors.

18.3 HOW MUCH TO COMMUNICATE

How much you communicate to your client depends in great part on which mode of communication you use and where you are in the design process. Phone calls convey the least amount of information. Emails, which should be kept to a screen or two, allow for slightly more information. Meetings allow you to communicate orally and visually, but be sure you stick to the most important information: your conclusions and decisions, and the key research data and design tools that support those. For example, if you are presenting your design direction after conducting user testing, you would show sketches or mockups of what you tested, a chart summarizing the major results, a decision matrix that enabled you to apply these results, and a sketch of your latest design concept. Further details, such as results from the brainstorming you did before deciding on alternatives, and the way you decided on those alternatives, are probably not of interest to the client.

Where you are in the design process also affects what you will want to share with your client. For example, it is not a good idea to show your mockups to the client before you have done some user or performance testing. Your client may not understand that you are using the mockups simply to elicit information about your ideas; he or she may think the mockups are early versions of your final design and therefore may discourage you from pursuing a promising line of investigation.

Finally, always bring your project notebook to the meeting to help you answer client questions.

18.4 HOW TO BENEFIT FROM CLIENT COMMUNICATION

When it's the client's turn to communicate, take notes during phone calls and meetings, follow through on suggestions, and report back with the results. If you think the client's suggestion is counterproductive, diplomatically explain why you would like to take a different direction. Ask your instructors for guidance if you need to.

Sometimes you may have to respond to criticism from your client. One client sent an email chastising a team for failing to tell her they were coming to her workplace to do user observations when she wasn't there. The team had forgotten that all observations must be coordinated with the client and had instead sought permission from someone else at the workplace to do the observations. The team could have sent an angry, defensive email or ignored the client. They wisely decided to send an email apologizing for the miscommunication and promising to make all future arrangements for user interaction through her. They also said they wanted to do the best job possible on the project and asked the client if she would like them to send a weekly update. She responded positively, and for the rest of the project was encouraging and helpful to the team.

If you receive a problematic or angry email from a client, resist the temptation to write an angry email in response. Instead, consult with your instructor about the best way to proceed.

Maintaining good communication is essential if you are to develop a design that your client finds successful. Moreover, you will discover that the good communication practices you use with your clients in EDC will serve you well in internships and jobs later on. Your employers and supervisors will be looking for those same communication practices from you on the job.