MSB Online Mapping Program

# **Facilitating the Initial Customer Meeting**

*The first meeting sets the tone for the project. It will help drive the expectations which feed into the attitude of the customer towards the project and towards the department.*

**Meeting Preparations**

The first meeting with the customer could be the defining the business workflow or gathering the project requirements. The following guidelines should be used for either.

**Service Desk ticket correspondence: I**nforming the customer of the Online Mapping Program process should help to ease concerns about what to expect. Informing the customer about the process will encourage discussion and cooperation. The following process statements will be sent via automated email or ticket correspondence after the ticket is received and assigned to an analyst.

1. Your GIS request and intake questions have been received and assigned via the Service Desk request. An analyst will perform some initial analysis to document the need and begin to seek a solution for you. Next will be a requirements gathering meeting.
2. After the requirements have been documented and the scope is defined there will be a request to sign off on the requirements. This is done so that expectation are clear, any changes to requirements as the project progresses are clearly identified, and there is a discussion point for out of scope items. Next the analyst will begin to mock up or draft the solution.
3. Once the mock up or draft is done, there will be another meeting to demonstrate the draft and make sure all are in agreement that the project is on track. If not, this is the opportunity to course correct. Next begins testing (if no course correction is needed).
4. Time will be given to test out the solution and identify any problems or changes needed. Once testing is concluded there will be preparation to move to production.
5. The analyst assigned to the project will be your contact.
6. Are there any questions about this process?

**Pre-meeting analysis:**

1. Start by reviewing the intake questions received with the Help Desk ticket request.
2. Find out what is additionally known about the request, the area the request is coming from, the requestor, and other players. For example, if someone in IT/GIS has already done a project for Animal Care, meet with them to discuss what they know. There may be existing documents the customer has already sent to them that you can study without asking the customer for them again.
3. Review the customer questionnaire and identify which questions do not need to be asked of this customer and which ones are relevant. Identify the person that will help you input the answer to the questionnaire questions during the meeting.

**Invitees:** Only essential MSB personnel should be there. Do not overpower the customer with too many players at the table. If more than one MSB employee will be at the meeting, get together prior to this meeting to discuss who the facilitator will be and find out what each individual wants to get out of attending the meeting. If an employee wants to attend the meeting but will not be on the project, find out what they hope to gain from the meeting. This will help to understand their presence and help them understand what their role will be at the meeting.

**Agenda:** Create and send an agenda so everyone understands what will be discussed and who the players are. This will also help those that are joining remotely. This will also give an opportunity to outline the purpose of the meeting and help in sticking to the time set for the meeting.

**Meeting Notes:** Always include a scribe. The meeting notes should be sent to everyone that attended the meeting. This will help the customer remember what was discussed. It will also help them to see the discussion in writing and may spark additional thoughts about something that was missed.

**Facilitating the Meeting**

1. **Meeting Introductions**

Even if everyone knows each other, it will be important to explain who is at the meeting and why. This will set the tone for:

* Who is the facilitator
* Who is/are the developer(s)
* Who is there to listen but not have an active role in the meeting

1. **Purpose of the Meeting/Review Agenda**

After introductions, state the purpose of the meeting to:

* Identify the need
* Find out how this need (or information) is being gathered today
* Discuss the process and next steps

1. **Intake/Help Desk Ticket Questions**

* Ask any follow-up questions where further clarification is needed
* State what the need is to ensure there is a common understanding
* Inform the customer that this request will still go through a prioritization process. This makes it clear to the customer that just because requirements are being gathered, doesn’t mean that this request will be fulfilled right away.

1. **Additional Questions (Questionnaire)**

The purpose of these questions is to gather requirements for the project, they are meant to be a guide.

Go through the questionnaire with the customer. If a new question is presented, be sure to document this (if this happens often enough, it will need to be permanently added to the questionnaire). Since there will be someone assisting with documenting requirements, be sure they are aware they need to capture new questions.

1. **Recap of Need and Desired Outcomes**

This part of the meeting is extremely important as it helps to be sure everyone is on the same page. This helps to ensure everything has been covered and understood.

1. **Next Steps**

It is important to set expectations about what is next. In particular state:

* When contact can be expected again
* Who will make that contact
* What will be presented to them next time
* Thank all participants for their time and adjourn the meeting