Initial Project Meeting with Stakeholder Overview

This document is meant to provide a guideline for meeting with your stakeholder initially. Cater the meeting in whatever manner is necessary for your specific project and stakeholder.

Prior to Initial Contact
Before you even contact your stakeholder, you should discuss availability of everyone on the team. It may be easiest to create a weekly calendar that shows the availability of all of the team members. Try to find as many times as possible that everyone is available so that you maximize the possibility of having an initial meeting with your stakeholder that includes everyone on the team.

Setting up the Meeting
Contact your stakeholder by email or phone (most likely email unless specifically requested by phone). Address the stakeholder as Mr./Mrs./Dr./Prof./etc. followed by the last name. Introduce the primary point of contact and the rest of the team. Explain who will act as the primary contact for the stakeholder for all project-related communication with the team.

State the availabilities of the group with the preferred meeting times, but make it very clear that the group is willing to meet at a time that is convenient to the stakeholder. Explain that an in-person meeting is preferred (if reasonable), but other meeting arrangements are an option.

End the contact by expressing interest in working with the stakeholder and your signature block with your contact information. Here is a sample email, but please do not use this email exactly as provided. You can use this as a template, but do not copy and paste it.

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Dr. Smith,

My name is Johnny Trojan, and I am a Computer Science/Business Administration student at USC in the CSCI 401 senior capstone course. I am the point-of-contact for your Algorithms for Driverless Vehicles project this semester. The team consists of the following people:

Tommy Cali – computer science major
Timmy Traveler – computer engineering major
Tammy Angeles – computer science games major

We would like to set up an initial meeting with you to discuss the project and determine the deliverables we will be providing. All of the team members are available to meet at your office after 12:00 p.m. on Tuesday and Thursday and anytime on Friday. I hope one of those times will work for you, but if not, please let me know your availability, and I will coordinate with the team. If an in-person meeting is not feasible, we can also set up a Skype call or conference call.

The team is very excited to work on this project. Of all the projects presented to us, this was the one that seemed most interesting. Thank you for your willingness to work with us this semester.

Johnny Trojan
B.S. Computer Science/Business Administration, spring 2018
University of Southern California
jtrojan@usc.edu
213-555-1234 (cell)
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Initial Meeting
Once you have set up an initial meeting with the stakeholder, make sure to arrive on time. Traffic or other predictable reasons are NOT reasons to be late to a meeting. Take something to keep yourself occupied if you arrive early. Make sure you have appropriate note-taking material (laptop, tablet, etc.), but also have a backup (such as paper and pencil) in case something goes wrong.

Everyone should be dressed in at least business professional attire. This means at least slacks and a polo for men and nice pants/skirt with a blouse or a professional dress for women. Most of the stakeholders will probably tell you that you do not need to dress like that for each meeting, but until they tell you that (or if they never tell you that), continue to dress professionally.

When your stakeholder greets you, refer to him/her with the title and last name. Continue to do so until your stakeholder tells you otherwise. Never ask your stakeholder what you should call him/her.

Small talk is okay as long as it is returned by your stakeholder. Keep in mind that everyone is busy, and you don’t want to spend too much of your time or your stakeholder’s time with small talk. On the other hand, showing shared interests is definitely a good networking tool.

Introduce everyone on the team, and if the stakeholder desires, a 30 second description of each person’s background. Although it is easy to talk about yourself for a long time, please refrain from doing so. Keep the description relevant for the project unless the stakeholder asks other questions.

Questions to Ask
Once the meeting has begun, here are a list of questions that you should make sure you get answered. This list is not exhaustive, and you don’t need to ask every question if you already know the answer or if it comes up in response to another question. These questions are not in any particular order, so rearrange them how you see fit.

- Can you explain the project a little bit?
- Is there existing code that we will be modifying or extending?
- What language/platform/technologies are used?
- Is there a programming team with whom we should communicate?
- How much documentation is expected at the end of the project?
- Is there a specific software methodology that we should follow (i.e. scrum, XP, waterfall, spiral)?
- We have to provide something to you every two weeks as a requirement for the class. Would you like more frequent status updates?
- Are there any specific design restrictions or decisions that we should know about?
- Is there a version control or code repository already set up?
- What features in the project are most important to you?
- What form of communication do you prefer?
- Can we set a time and location (in-person, Skype, phone, etc.) for our next meeting?

Of course there could be a lot more questions, and many of these questions should have follow up questions that are specific to your project. Hopefully this gives you a little direction though.