Client Considerations

Outline

Our Perspective

Sometimes discussion of clients appears negative.

However, it is not intended to criticize or demean them.

It is intended to sensitize us to the client's motivations and perceptions.

Terminology

"Client" is deliberately ambiguous.

"Client" may mean any or all of:

System "Owner"

- ◊ responsible for the environment in which project will function
- ◊ those who set goals

System Manager

- ◊ those who set objectives
- ◊ typically your contact

System User

A.K.A. "End User"

- ◊ those who achieve objectives
- ◊ internal users
- ◊ external users − common with WWW

Entire Organization

Client Pitfalls

Pitfalls

abound in client relationships!

Pitfalls

can ruin projects!

Pitfalls

are **not** to blame if you fall in
(and neither is the client)!

Professional Responsibility

If the project fails because the client
fails to communicate clearly,
it is your fault!

If the project fails because the client
has muddy goals and objectives,
it is your fault!

If the project fails because the client
incorrectly describes the real problem,
it is your fault!

Some Pitfalls

A client who:

- confuses symptom, disease, and treatment
- does not see scope of the problem

  does not communicate scope of the problem
  time
  people
  process
- ignores conditions & exceptions
- describes normative, not actual, behavior
- incorrectly perceives information requirements
  derived data
  generalizations
  temporal data
- resists computerization because of fear of:
  “computer phobia”
  loss of job
  loss of control
- “knows just enough to be dangerous”

Dimensions of Client’s Perspective

normative	⇔	actual
official	⇔	informal
professional	⇔	personal
organizational	⇔	individual
goal	⇔	method

culture

Dealing with Perspectives

1. Recognize different perspectives

2. Fully understand client’s perspective:
    - domain
    - organization & operation
    - biases

3. Transform to IS perspective
    - use standard conceptual framework

4. *Anticipate*

In A Word

- Recognize terminology used by the client
  - ◊ domain-specific
  - ◊ jargon
  - ◊ idiosyncrasies
- Adopt that terminology when dealing with client
- Translate “tech-speak” into common parlance
- Add to client’s vocabulary when the word carries a new idea
  (or a new distinction)
- Goal is communication;

✯ you are the one to facilitate that!

- Ontologies
  - ◊ originally, a branch of philosophy
  - ◊ now, representing interlinked words & meanings
  - ◊ central to “Semantic Web”

Summary − You and the Client

Responsibility:

- Clients have their jobs to do;
  an IS is only to support these jobs.

- Your job is the specification, design, and implementation of the IS.

Fixing the Target:

- The Requirements Specification will define what *you* consider a successful project.

- The Client Agreement says this can't be changed without your acquiescence.

The Lighter Side web link to views of system at
`http://www.monkeynoodle.org/comp/the_tree.pdf`

Mismanagement by the Client

In spite of what has been said, certain general practices are bad management:

☆ Use IS to reinforce poor practice

☆ Hidden agenda

These **are** reasons to walk (or run) away from a project.

Client Centered Development

In commercial settings:

⇒ Client representative on systems analysis team

In Information Systems class:

- Engage the client
- ○ Precision, not overwhelming details
- Examples and metaphors
  choose these carefully
- \+ Formal feedback on specifications

Also, make client confident in you:

- Present yourself professionally
  appearance
  organization
  speaking & writing
- Be knowledgeable

Client's Perspective of **You**

Client must *have confidence* in you

Build confidence by:

- knowing the client's area
- appearing professional
  - □ knowledge
  - □ personal presence

Maintain confidence by:

- meeting expectations

Information Gathering

Interviewing

Observation

Documents

moving down above lists tends to move
from Feasibility Study
toward Requirements Specification

Interviews and Observations

Whom to interview/observe:

- executives
- managers & administrative staff
- operational staff (clerical, shop floor, *etc*.)

What to ask/look for:

- information passed or processed
- decisions that are made
  - why
  - when
  - based on what

Documents

- business plans (or equivalent)
- policies & procedures
- job descriptions
- forms, reports, *etc*.
- existing computer programs and databases

Interview Process

Before Interview

plan and schedule interview

prepare for interview

During Interview

open interview

body of interview

close interview

After Interview

review what was said

follow-up for clarification and elaboration

Before the Interview

- Arranging the Interview
  - □ inform the client
  - □ indicate the topic

- Planning
  - □ define the topic
  - □ organize your questions
  - □ designate roles to team members

- Preparing
  - □ learn about the client’s business area
  - □ learn about the client’s organization
  - □ memorize clients’ names

During the Interview

- Opening
  - □ introduce team − in broadest sense
  - □ summarize previous meetings findings (if applicable)
  - □ introduce the topics

- Conducting
  - □ make clients feel they are participants in the solution
  - □ take notes, but listen!
  - □ keep it short
  - □ keep it focused
  - ☆ but let the client talk

- Closing
  - □ summarize
  - □ thank clients for their time

After the Interview

Immediately

- Review
  - □ organize your notes with a partner
  - □ summarize findings

- Identify Points still Unclear
  - □ starting point for the next interview

- Evaluate your Performance
  - □ content (product)
  - □ human interactions (process)