<u>Student Team Member Roles & Expectations and Best Practices for ICC Success</u>

This document is developed to help you and your team to have success with your client project. Habits and skills learned by reading and applying this information will also help you professionally post-graduation. Please carefully review this document!

Each project has its own unique challenges and identifying roles for team members can help with team efficiency and effectiveness and ultimately client satisfaction. For your team, identify a project manager and a recorder (2 different people) and make sure that each team member understands their role. The purpose of assigning these roles is not to give various folks more work, but rather to build efficiency and accountability into the consulting process.

Below is information on these team member roles, in addition to project and client management expectations.

Project Manager – single point of contact for mentor and client. Duties entail: – scheduling meetings, communicating with team, documenting status of deliverables after team has agreed on them (content and when due), and for reviewing content and format of deliverables fit with client expectations.

Recorder/secretary – takes notes at all meetings and shares this with team in a timely manner; project manager relies on this information to accomplish her/his job. Shortly after meeting, Recorder circulates via email meeting notes to the team and to the mentor if mentor is unavailable to attend meeting.

Rest of team (ROT) – support team deliverables.

Communication tools – Identify free or low cost tools to help your team succeed. For example, you may use Google docs, Doodle to set meetings, and a conference call line can be provided to you by the ICC if a team member or mentor is not able to be physically present. Please request conference call information from Dr. Peter Kaufman (pkaufma@ilstu.edu).

<u>Expectations:</u>

Fall prep & Spring meetings: Meet with your team at least 3x in the fall term. You may meet with them more than 3x in fall but this is the minimum. In the fall the purpose is to meet your team and then client, introduce yourself, ID an online platform in which to communicate for project duration, outline a spring meeting schedule where you can meet weekly and pick a meeting scheduling tool (e.g., Doodle). The intent of the fall preparation is to avoid delays in the spring and outline any major resources (contacts, information sources, information gathering methodology such as survey development or interview guides) needed in the spring that will take time to schedule.

Client management: For most ICC projects an organizational client will be involved. To maximize client satisfaction, clarify project goals at the outset (mid fall is ideal) in conjunction with your mentor. Additionally, and very important, ask the client how often they prefer that the team checks in with them to provide them with updates, ask for feedback and further clarification, etc. Every organization has its own cadence (tempo), but at a <u>minimum</u> outside of at least **one** fall client clarification, the team should check-in (“gate post review”) with its client **four** additional times in the spring. Suggest: end of January, the middle of February, early March, and end of March. A gate-post review consists of sharing student team ideas, recommendations, etc. (in writing with verbal explanation ideally). Preferably, this is conducted face to face or via a telepresence product (Skype, etc.) but could also be done on a conference call. Your team can be provided with a conference call number. Please ask Dr. Peter Kaufman for this resource, if needed.

April Symposium

The end of year Symposium at ISU will be in early April where your team will present its recommendations. Client may or may not be able to attend this event and an additional presentation day/time may be needed so please arrange well before Symposium to ensure that this non Symposium presentation takes place.

Surprises

If your client is unresponsive to any of the gate post reviews please let your mentor and Dr. Peter Kaufman know (pkaufma@ilstu.edu). If one of your student team members is “MIA”, please also let your mentor and Dr. K. know.

If you need to withdraw from the ICC, please let your team members, mentor, and Dr. K know at least via email but ideally also face to face with your team and mentor. This action likely will have a negative impact on your team’s performance so we ask that unless there is a serious issue please honor your commitment to your team, your mentor, the client, and the ICC!

We look forward to your participation!
ICC Coordinators

Best Practices for ICC Project Success
Based on observations and experience by Andrew Bordewick, ICC Project Mentor and ISU Alumnus
April 2018

1. Schedule team meeting times to meet in person on a frequent basis (weekly or bi-weekly at a minimum) and stick to that schedule. This helps with team formation, cooperation, and accountability, which will improve the quality of your work. Work as a team, and find ways that everyone can contribute.

2. Work with the client to determine the scope of the project as soon as possible, including what they are expecting as a final deliverable. Start with identifying the final deliverable so that you know what you are ultimately responsible for, then work backwards to plan the activities required to complete your project.

   A. Take time and make an effort to define terms when working with the client – this is absolutely essential! Your definition of a “marketing plan” may not be the same as their definition of a “marketing plan”. Be deliberate in talking through what they mean, what they want, what they are looking for. Ask for examples if they have any. The last thing you want to do is to work for 6 months, present your deliverable, and then find out the client was looking for something completely different.

B. Be realistic and upfront with the client about your schedules, capabilities, capacity, etc. They may not have realistic expectations for a student project, or in some cases may underestimate your abilities. Talk through what your team is capable of doing and set proper expectations for what you will deliver.

3. Create a timeline of activities for the entire project and meet every deadline. Assign tasks and hold each other accountable to ensure that you are progressing towards the final deliverable. If your timeline is too ambitious, or if you start to get behind, that is an indication that your project scope is too large and you need to reduce your activities and/or the planned deliverable. If a change in scope is required, have an open conversation with the client and come to an agreement on a revised deliverable.

4. Establish a minimum frequency of communications with the client, and use the method that they prefer (phone, skype, email, in-person). Meet those minimum expectations for meeting check-ins, and then use email for questions between official meetings.

A. Have the Project Manager be the funnel for all communications and single point of contact for the client. This makes things much easier for them.

B. Keep your mentor informed. Carbon copy the mentor on all emails to the client.

5. Use your mentor as a resource: bounce ideas; ask questions; have them proof-read surveys, documents, emails, etc; ask for advice on research methods. If you encounter problems with the client, ask for the mentor's assistance in facilitation and communication.

A. The mentor will not do any of the work for you. However, a short conversation with your mentor may point you in the right direction and make things much easier for you.

B. The mentor may have other resources in their network that can help your team – experts in a certain field, knowledge about research methods, experience with software, industry contacts, etc.

C. Meet with your mentor in person once a month at a minimum, and communicate via their preference (email, text, phone) in between meetings.

6. Practice your final presentation multiple times at least 1 week before delivering to your client. Practice in front of a group of peers, another ICC group, your mentor, other student groups, a professor, etc. Get a range of feedback about your content, slide design, verbal delivery, etc. Iterate and improve!

7. Keep a journal of your experience – things that go well, things that don't go well, improvements made, your contributions to the team, interactions with the client, lessons learned, etc. This will give you excellent material to talk about "real world" consulting experience in future job interviews.