Strategies for Effective Client Interactions

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Class Parameters

- In Sta-330, you should target 60-minutes of meeting time with your client per presentation cycle (every 2-weeks)
  - You may opt for two 30-minute meetings, or a single 60-minute meeting
- Some clients may be receptive towards more frequent or longer meetings, but you should not assume or exploit this
  - You are encouraged to use email to receive clarifications between scheduled meetings

Realities of client interactions

For a client interaction to be effective, you must consider the experience of the involved parties (the client and yourselves):

	Data scientist	Client
Business understanding	-	-
Project goals	-	-
Modeling and analysis	-	-
Data limitations	-	-
Technical limitations	-	-

In which areas will you generally have greater expertise? In which areas will the client have more expertise?

Time Management

It is impossible to reconcile all of these differences in a 60-minute meeting. Instead, you should take a triaged approach, placing relevant topics into one of three groups:

1. *Need to know* - progress cannot be made without discussing
2. *Want to know* - progress can be made without discussing, but discussion might improve efficiency
3. *Not necessary* - unlikely to impact progress or efficiency

These categorizations apply to interactions *in both directions*: things you'd like the client to share with you, and things you'd like to share with the client.

Planning Ahead

Last week (and earlier today) you had the opportunity to reflect upon topics related to business and data understanding for each project. Now, let's assume we're planning for our first client meeting and want to know what to discuss. Categorize the following items as *need to know*, *want to know*, or *not necessary*:

1. In what ways do Hebrew language words differ from English words?
2. How are the data from these eye tracking experiments organized?
3. How many individuals participated in the study?
4. How should trajectory of word recognition be evaluated?

Planning Ahead (cont.)

- Within your group, browse your previous reflections and categorize each major topics you discussed as "need to know", "want to know", or "not necessary" by adding a textual tag
  - For example: "We'd like to know how Hebrew language words differ from English language words [Not Necessary]"
- When finished, you may work on your personal project preference reflection
  - Please start this today, and revisit it tomorrow before submitting it
- On Thursday, teams will be assigned, we'll briefly discuss goal setting, and you'll plan your first client interaction