

Sta-330 Procedures and Guidelines

Client Interactions, Goal Setting, and Workflow

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Client Interactions

1. Your client's time is valuable and your goal is to provide them value.
 - ▶ You should meet with your client for approximately 60-minutes during each briefing period (roughly 6 meetings throughout the semester)
 - ▶ While some clients may signal openness to spending additional time with your group, you shouldn't make that assumption
2. Meetings with your client are your best opportunity to develop **business understanding**, or insights into how the client views your work as relating to them.
 - ▶ Developing business understanding often involves learning shared terminology
 - ▶ You should try to adopt language your client understands, even if there's an analogous term used in data science or statistics (ie: false positive vs. Type 1 error)

Client Interactions

Because your client's time is valuable, you should enter every meeting with a plan. To facilitate your plan, first consider your expertise (the data scientist) vs. the expertise of your client in the following areas:

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

Areas with mismatching levels of expertise often require more careful attention. For example, if you know your client lacks expertise in statistical modeling, you should come prepared to explain your models in simpler terms.

Client Interactions

It's often impossible to discuss every question you might have about your project during a 60-minute bi-weekly meeting. Instead, you should take a triaged approach, placing questions 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.

Practice

Suppose you're planning to meet with your client on the ITS Ticket Classification Project. Categorize the following as either "need to know", "want to know", or "not necessary".

1. How many years of records are in the data set?
2. What is the target variable that the models should try to predict?
3. Did ITS ever change the way it collected ticket data during the period where these data were obtained?
4. Has a separate testing set already been held out?

Project Management

- ▶ **Scrum** is a team collaboration framework commonly used in software development and related industries
 - ▶ The core premise is to break down a complex project into “sprints”, or short time-based periods with specific goals
- ▶ Each sprint begins with a planning stage where goals are set
 - ▶ Sprints end with a review (a progress briefing in our course) and a retrospective (reflection)

Values and Principles

Scrum arises from Agile software development, a framework whose core values are worth considering:

1. Individuals and interactions over processes and tools
2. Working results over documentation
3. Client collaboration rather than negotiation
4. Responsiveness over sticking to a plan

Common themes are *flexibility* and *working with others*.

Goal Setting

- ▶ Goals are not “to-do lists”
 - ▶ “I will schedule our client meeting” is *not* a goal
- ▶ The **Objectives and Key Results** (OKR) framework should guide your goals for each sprint
 - ▶ *Objective* - a qualitative description of what you'd like to achieve
 - ▶ *Key Results* - a set of metrics, standards, or products that you can use to assess progress towards a goal
 - ▶ “I will _ as measured by _”
- ▶ Goals should be *incremental* as a means for making them achievable

Practice

- ▶ Suppose you've just met with your client on the Database Development project.
 - ▶ You now need to set goals for an upcoming sprint that you'll be *presenting in 10 days*.
- ▶ Develop *three* achievable goals that utilize the OKR framework for this sprint.