



Productive Meeting and Team Expectations

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The Kick-Off Meeting

- The sponsor meets the entire team and the team has an opportunity to meet other members of the sponsor's organization who may have some involvement in the project.
- The goal of a kick-off meeting is to make introductions, discuss the process to be followed and establish expectations for both yourselves and the sponsor.
- The goal of the kick-off meeting is *not* to gather detailed requirements.
- Probably a good time to discuss licensing



Planning and Executing Meetings

- Successful Meetings Just Don't Happen!
- Get used to meetings
 - professionals attend 62 meetings per month on the average
 - estimates are that over 50 percent of meeting time is wasted
 - Usual reasons: lack of goals or agenda, going off on tangents, time management, missing participants, failure to converge

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Set goals for the meeting

- identify the "owner" of the meeting
- prepare an agenda
- prioritize issues to be discussed
- consult with others to finalize the agenda

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Arrange logistics

- find a comfortable and convenient meeting place
- arrange in advance for markers, copies of documents, etc.
- arrive early to set up

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Make sure everyone knows about the meeting

- send out an announcement and reminders for meeting
- circulate the agenda and documents in advance

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Make sure everyone feels able to contribute

- be courteous and respectful to each other
- be inclusive
- start and finish meeting on time
- engage all participants during meeting

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End the meeting

- come to a decision
- identify action items
- summarize main points and what and how follow-up will be accomplished
- plan the next meeting

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A Meeting Timeline for Capstone Projects During Term #1

- Week 5 – Kickoff Meeting. Issues: Getting to know each other and establishing expectations.
- Week 6 – Requirements Gathering Meeting. Issues: Learning the details of what is expected. *May involve follow up meetings.*
- Week 9 – Approval Meeting. Issues: Ensure the teams' vision of what is expected and the sponsors' vision of what is expected agree.

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Things to Do Right Away!

- Organize
- Schedule Kick-Off Meeting
- Achieve Group Agreement on Process

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Point of Contact

- Teams are large and sponsors are busy - more than one person contacting the sponsor will become confusing.
- Contact the sponsor as soon as possible and introduce yourself as the point of contact .
- Provide a reliable e-mail address that is checked daily and always use that address when contacting them – an .edu address is less likely to get filtered into the junk folder than a hotmail, yahoo or gmail address.



Duties of the POC

- The POC's job is to coordinate information flow and set (and maintain) customer expectations.
 - Organize meetings between the sponsor and the team members
 - Make requests of the sponsors
 - Field questions from the sponsor
- The POC's job is *not* to gather requirements, negotiate deadlines, or deal with the sponsor's ISP.



Establishing Expectations

- It is important the sponsor and team agree on how things are going to work. Are you going to provide bi-weekly prototypes? Show up once and come back in three months?
- Will you develop on a server at PSU and port it over to their server at the end, or do your development on their server? Is their server a Server 2003 machine? Or Linux with Apache?
- Discuss issues you can anticipate within your team before you go there so you're all on the same page.



The Agenda

- Prepare an agenda before the meeting – while the kick-off meeting is light and social, it is also important to get whatever business you need to transact covered – *write it down, or you'll forget!*
- Make one person a note taker so you have a reliable record of what went on at the meeting. When you're done, the POC should e-mail the sponsor and summarize the points that were discussed to confirm that the sponsor is in agreement.
- You don't want a sponsor wondering when they're going to hear from you next or what the next step is



IMPORTANT!

YOU ARE THE DRIVER

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Follow On Meetings

- Trying to coordinate seven (at least) schedules to meet with the sponsor will be tough.
- After the initial kick off meeting, limit meetings with the sponsor to only two or three team members at a time – only those who need to be involved in the meeting.
- The POC should, in general, organize these meetings – but they don't have to attend
- Always have at least two team members attend a meeting – *have an agenda and take notes*



Team Functions

- POC
- Project Manager
- User Needs Analyst (s)
- Computer Nerd
- Designers
- Developers
- Quality Assurance
- Perhaps others, depending on the project



Project Manager

- Organize the team
- Develop a plan and a schedule with input from team members
- Keep track of progress
- Keep track of commitments
- Arrange for resources
- Serve as Point of Contact to Warren – all communication between the team and Warren goes through the PM



User Needs Analyst(s)

- Determine what it is the user really wants
- Explain it to the rest of the team
- Verify with the sponsor that what the team is proposing will meet his needs
- Good idea to have at least two – a primary and a secondary



Computer Nerd

- Each team is responsible for their own hardware and software – start the project off with a collection of bare machines
- One or more team members will have to install and configure the systems
- User accounts will need to be set up on the systems, back-up procedures established
- Access policies need to be designed and remote access configured



Designer(s)

- Overall architectural design will need to be developed – what parts do you need, what do they do and how do they connect with each other ...
- The architectural design must be explained to the rest of the team
- Each developer will work on implementing a part of the architectural design
- It is important that there is an arbitrator or arbitration process defined and agreed upon *ahead* of time – ad hoc arbitration doesn't work!



Developer(s)

- Create the pieces of the system as defined in the Architectural design
- Free to do what you want as long as the functions described in the architectural design work and interface with the rest of the system as defined
- Need to coordinate human interface details for consistency of user experience



Quality Assurance

- Ensure a correctly functioning product gets produced
 - User Needs – did the User Needs Analyst accurately capture what the Sponsor is asking for?
 - Architectural Design – is the Architectural Design consistent and unambiguous?
 - Development – are developers meeting the functional and communication requirements articulated in the architectural design?
 - Endgame – will the product, taken as a whole, satisfy the sponsor?