**Stakeholder Interaction Guidelines and Closed Loop Communication**

**Instructions for using Template:**

1. In the template below, the designated notetaker should fill in all the necessary fields.
2. The Q&A section should be used as transcript to document the interview.
3. In the field which says **summary;** summarize all the important topics covered.
4. Communicate with the stakeholder either through phone, email or in person, and follow-up to ensure that you have accurately **captured** and **interpreted** his or her input.
5. The person editing this document should print and sign their name for authentication

**Relevance:** It is critical to communicate early and clearly with your stakeholder, and to follow-up and clarify information gathered from stakeholder interviews. The result is clear expectations on the parts of both the design team and the stakeholders.

**Stakeholder Interaction Guidelines:**

Preparation for an interview with stake holders

1. Students should make an appointment with the stake holder 3-7 business days prior to the intended day of the interview. Make use of faculty office hours where appropriate.
2. The team should discuss the aspects of the project they wish to address with each stakeholder – why do you want this person’s input?
3. These key areas or points should be summarized and emailed to the stakeholder at least a day before so at the interview the stakeholder would be prepared to answer the questions and will be able to give a valuable feedback.
4. Always mention the **project name** and most importantly “**Senior Design or Design Project Management**”, in the emails that are sent to the stakeholder.

At the interview

1. Students should be punctual since many stakeholders are busy which will lead to insufficient time to discuss about project requirements. Therefore being late will have an effect on the credibility of the team
2. At the start greet the stakeholder and start the interview. Be polite and listen to the stakeholder’s feedback and make sure meeting minutes are taken with use of the **Closed Loop Communication Template**, since it will help the teams who will follow up on the project to get an understanding of what was discussed
3. Once the interview is done ask the stakeholder for a feed back on how to make the project better.
4. Thank the stakeholder for the interview

After the interview

1. Convert individual bits of information gathered to your Affinity Diagram.
2. As a team, discuss and interpret the information gathered
3. Summarize your key findings
4. Send interpretation and summary of key findings to stakeholder for confirmation.

**Stakeholder Interview Template**

|  |  |  |  |
| --- | --- | --- | --- |
| Date |  | Project # |  |
|  |  |  |  |
| Start Time |  | Customer Name |  |
|  |  |  |  |
| End Time |  | Location |  |
|  |  |  |  |
| Team Members |  |  |  |

Was a follow-up with the customer completed? (circle one) YES NO

If so,

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member who clarified the information:

How was it clarified: by phone\_\_\_\_\_ email\_\_\_\_\_ in-person\_\_\_\_\_ other\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Summary: (summarize key findings from the interview in this space; please make sure to review with your team and the customer/stakeholder)

**Interview Transcript:**

Q:

A:

Q:

A:

Additional details: (other information, or information that is revealed during follow-up, if applicable)

**Reflections:**

Describe lessons learned related to the content of the interview, as well as the process