

# **ITM Capstone Survival Guide**



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**TORONTO**



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# Dedications

*This book is dedicated to the many ITM students who've come before us. The ones who helped to pave the way and whose shoulders we get to stand on. This is also dedicated to incoming Capstone students. Remember, you are the future of the IT Industry so make it count.*



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# Introduction

It's no secret that university students are often not as prepared as they need to be for the real world. Adding a little salt to the wound, many students, upon graduating, can quickly get trapped in the “need experience to apply but can't get experience unless I get a job” circle. That's why co-op and capstone programs exist; to give students the experience they need to avoid being disqualified right off the bat.

While these programs afford students wonderful opportunities to try their hand at work in their given field, many are faced with the daunting task of translating classroom learnings to applied techniques that have real implications on a company and the clients they serve.

This ITM Capstone Survival Guide is specifically written to respond to the unique needs of the BTM Capstone students at the Ted Rogers School of Information Technology Management (TRSITM), as the Capstone project is the only of its kind within the school that lasts a longer period of time (eight months).

There are some common challenges faced by these particular students that can dull their learning experiences.

In particular, students have struggled greatly with securing a committed client that is eager and ready to jump on board and remain partnered with a student group for the 8 month duration of the project. It is difficult enough for students, most of which are lacking any real networking experience, to find and persuade a client lead to sponsor a Capstone project and even more difficult to do this under an intense deadline.

*What is the deadline to find a client?* That is one of common questions asked by students. What makes the 90A/B Capstone project course different from other courses is that students are expected to begin working on the project on the first day of class. This carries with it hidden expectations that by that point, they should have already formed a group and found a client to work with. This means that if students haven't fulfilled one or both of these requirements, they are already behind on the first day of class.

As well, students have expressed no shortage of grievances over effectively managing their client relationships in a way that sets everyone up for success. This comes as no surprise since most of these students are ill-equipped in both knowledge and experience to know how to properly manage their dealings with clients. Oftentimes, these shortcomings involve:

- Setting unrealistic expectations (Ex- in the contract, frequency of communication, deliverables, etc.)
- Inability to keep clients engaged and motivated

- Either initiating or inappropriately responding to conflicts with the client
- Unprofessional behaviour
- Lack of clarity and/or loss of sight into what the real project goals are

So, this guide essentially helps to fill the knowledge gaps and prime Ted Rogers IT Capstone students in a way that they can start their consultancy with their A-game on.

## **So, Why Pressbooks?**

In 2016, Ryerson University partnered with eCampus Ontario in an effort to make post-secondary education more accessible for its students. Part of this endeavour entailed the Pressbooks platform as a tool to create free online learning resources.

In the past, we've attempted to relay some of the information in this Survival Guide through information sessions and workshops, but we felt that our message was restricted in some ways by the forums being used and simply put, we just weren't able to reach everyone. Pressbooks solves most of these issues and then some.

By providing this guide through Pressbooks, students can access content at any time as long as they have a running internet connection. That means that during the summer months when incoming Capstone students are gearing up for the course, they

can remain at work or on vacation without fear of not having access to needed information. For those who don't always have access to the Internet, or for the ones who are keen to read physical textbooks, this book can also be saved as digital document or even printed. What's more is that using this platform, we're able to deliver multi-modal content in ways that our previous methods (ex- workshops) wouldn't allow. In this guide, students can build up their knowledge of all things IT Capstone related by reading, watching videos, playing games, doing quizzes, etc.

## **What to Expect in This Guide**

The ITM Capstone Survival Guide is organized into five parts. Each part addresses a different facet of the Capstone essentials that you'll need to be in the know about. Because the way this guide is organized, you'll find that it's quite simple to find that topic you're interested in. We cover a lot of ground here, so most certainly, whatever Capstone related topic you're looking for, you can almost bet that it's covered in this guide somewhere. Here's a quick rundown of what you can expect to see in each part:

### **PART 1 – Killin' It Already: Getting Set Up For An Epic Win**

Being successful on your Capstone project hinges upon you ensuring that your team has taken the right steps to be set up for

a big win. The chapters in this section will cover everything you need to know and do before the course officially starts. It's all about hitting the ground running on day one.

## **PART 2 – Consulting U: The Rundown On IT Consulting**

Most of you don't have actual consulting experience and yet you'll be expected to run this project like a seasoned professional. Don't worry, we've got your back! Consider this part like a crash course on IT consulting. You'll get to dive into each phase of the consulting process and explore the appropriate requirements and outputs.

## **PART 3 – The Life Of The Party: Everything You Need To Know About Managing Your Client**

Journeying through client relationships, like any other relationship, can sometimes be messy but rewarding endeavours. The relationship you have with your client is important because it is the cornerstone of your project; without it the project doesn't exist. In this part, we give you the low-down on how to manage these special client relationships effectively.

## **PART 4 – It's All About That Bass, No 'Trouble': Problem Solving Proactively**

Let's face it, all consultants, whether student or professional, are met with problems. In fact, it's the crux of what you do – using your skills to solve problems. But what about when you're facing unexpected or unwanted problems. You know – the kind that makes your insides scream “eek!”. Part 4 is all about giving you the tools to navigate through these sort of issues with wisdom and grace.

## **PART 5 – What's In My Toolbox?**

The items in Part 5 are things that any good IT consultant would have in their proverbial toolbox. This book is all about equipping you, so in this part you can find a range of tools (templates, checklists, app links, etc.) and other resources (articles, excerpts, etc.) organized by relevant chapter that you can arm yourself with to manage your Capstone project like a boss.

## **PART I**

# **PART 1 - Killin' It Already: Getting Set Up For An Epic Win**



PART 1

# KILLIN' IT ALREADY

Getting Set Up For An Epic Win

# 1.

## Chapter 1: Course Eligibility

Before you jump into the full swing of things, it'll be good to first ensure that you personally have everything in order. The following should be done before forming your group or securing a client, topics that'll be discussed in the next few chapters.

### Prerequisites

One of the very first things you should do is check whether or not you've completed all prerequisites to start the Capstone course. Since some of the required courses are not offered every semester, it is each student's individual responsibility to manage their course planning to ensure all prerequisites are met. Students should consult their [Academic Advisement Report](#) to view their degree requirements.

As of May 2018, as per the [ITM 90A/B info page](#), the prerequisites include the following:

### ***4 Year Program & Co-op Students***

Successful completion of ALL REQUIRED courses in the first three years of the program and a minimum of 25 completed credits. It is strongly recommend that Professional Electives from Table I in Semester 5 & 6 are complete to meet minimum requirements.

### ***2 Year Public Ontario College Diploma Students***

Successful completion of ALL 10 courses in the 1st and 2nd semester of the curriculum.

### ***Direct Entry Students***

Successful completion of ALL Reachback courses listed on your Offer of Admission in addition to ALL Required (Professional/ Professionally-Related) courses in the 5th and 6th semester.

## **Important Things To Know**

ITM 90A/B is a two-term course that starts with 90A and continues and ends with 90B. 90A is usually offered in the Fall) and 90B in Winter semesters. A large number of students tend to commence 90A/B in the Fall semester.

To accommodate the needs of some part-time and full-time

students, the school has offered ITM90A/B throughout the Winter and Spring/Summer terms in the past. However, it is not guaranteed that the course will continue to be offered outside of the regular academic timeframe (Sep. – Apr.) in the coming years. So, it is highly recommended that you check with the TRS ITM office and plan accordingly.

During the course intention process, you will only be required to enrol in ITM 90A and the Registrar's Office will process the enrolment for ITM 90B for you.

## 2.

# Chapter 2: Group Formation

It is no secret that forming a group can sometimes be an awkward process. Especially if you're approaching people that you haven't worked with before or don't know well. On the flip side, nobody likes to get picked last. The good news is that there are things you can do to firm up a suitable team. It all comes down to strategy.

## Where to Look

By now, you will have gone through more group projects than you'd like to admit. You've sat beside hundreds of other students and you've hopefully found new friends in the crowd. The best place to start looking for people to join your Team Awesome would be connecting with those you've actually had experience working with. You would have seen these people in action and

observed both their ‘wow’ moments and cringeworthy fails. If you’ve worked well with someone in the past, chances are that they’d be a suitable match for your Capstone team.

For those of you who have no group work experience in BTM and were miraculously teleported into the Capstone class or those who are honestly having a hard time finding the right people, there’s hope. The following table suggests some sources where you can find group members along with pros and cons of each source:

| Sources for Finding Group Members     | Description                                                                                                                                                                      | Pros                                            | Cons                                                                                                                                            |
|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Capstone project information sessions | Every year in March the course coordinator will hold a two-hour session for incoming capstone project students to discuss the capstone project and issues related to the project | Meet fellow students who don't have a group yet | Only one event per year (and the event may not be offered each year due to various constraints) and you may miss the event for multiple reasons |

|                                                       |                                                                                                             |                                                                                                                                                  |                                                                                                                                                                                                                                             |
|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ITM 90A/B graduation project Google Forum             | It is a Google Group where all incoming students are automatically enrolled                                 | <p>All students are enrolled to the forum</p> <p>Can post messages looking for group members (see Chapter 19 for tips on effective messages)</p> | <p>Not all students have their prerequisites completed</p> <p>Forum includes students who intend to take the course in the Fall/ Winter as well as the Winter/ Spring/ Summer terms</p> <p>Not all students check messages all the time</p> |
| Networking and other events offered by the department | Throughout the year, ITMSA and WITM host events, workshops, and seminars which are open to all BTM students | Meet like-minded fellow students                                                                                                                 | Not all attendees are in their final year to take the Capstone project course                                                                                                                                                               |

|                       |                                                |                                                                    |                                                                                                                |
|-----------------------|------------------------------------------------|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| Referral from friends | Ask people you know to get some recommendation | The recommendations are mostly likely based on personal experience | Experience with the referral is sometimes not first-hand so the recommended students may not meet expectations |
|-----------------------|------------------------------------------------|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|

## What to Look For

You’re looking for talented people who have an amazing work ethic. Seriously. And 4-5 of them. Do this as early as possible too because you never know who might have to drop out of the race due to challenges with prerequisites, personal issues, or other issues.

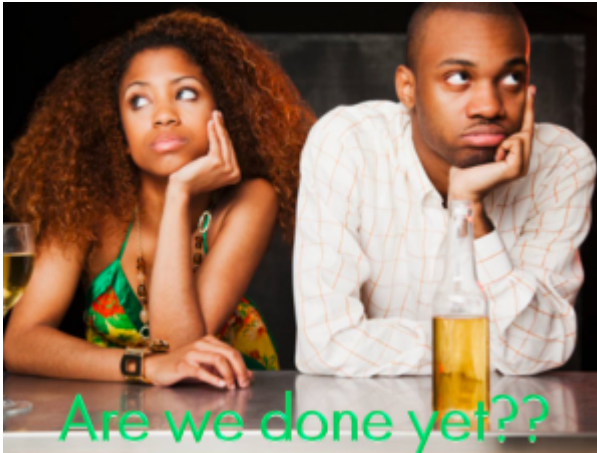
### SIDE NOTE

*It’s not uncommon to lose members on a team. While gearing up for the Capstone course, my group went through the scary process of cycling through 3 members. The first person left because they needed to take time off from school for family reasons. The second person discovered a week before the start of class that they didn’t have all of the needed credits to take the course. The third person was honestly, just not a good fit. Based on one initial conversation just days before the start of the school*

*year, my team realized it just wasn't going to work out with that person.*

*In spite of our best efforts (we started meeting and getting organized in May), we were only able meet and onboard our final member on the first day of class. With a list of questions ready in hand, I interviewed this unknown person to size him up. At that point my team had grown tired of the unexpected turnover and feared being disqualified from the course as a result of not meeting the team size requirements. The person I interviewed later claimed that I interrogated him, but we're able to laugh about it now since we're happily married. It just goes to show how important it is to choose your group mates wisely. You never know what sort of strong bonds might be forged as a result!*

Ideally, you'll choose people who you have experience working with. For those you haven't worked with, interview them and be prepared to answer their interview questions. If they don't have questions for you, it should be a red flag that their head might not be in the game. It'll also be a good idea to ask for samples of work and test run those who show strong potential.



Whether you take a more formal interview or casual kind of approach, at the very least you should be looking for people who:

- Have an incredible work ethic
  - Integrity
  - Strong sense of responsibility
  - Focused on quality outputs
  - Disciplined in time management
  - Able to work independently when necessary
  - Strong desire to collaborate and work as a team
- Are open-minded
- Share the same goals and aspirations

- Offer complementary skill sets
  - Leadership, project management, research, organized, financial analysis, business analysis, oral and written communication skills, strategic, professional or amateur experience, problem solving, ability to simplify processes and complex issues, offers positivity and keeps peace

## Five Important Reasons To Be Selective

1. You want to graduate. A non-performing member can drag you down, big time!
2. This is a client facing project and your reputation as well as the school's image are on the line, especially as more and more clients use the Capstone project as a casting call to find potential employees.
3. Like it or not, you will be struck with your group members for eight long months.
4. The capstone project is very complex and requires extensive research and analyses. In other words, it is not something that you can do all by yourself.
5. For most students, the Capstone project offers real work experience in IT management from beginning to end. To get the most of the project experience and deliver the best results, you need people who can

perform.

## **Team Pitfalls to Avoid**

Some people do a really great job of only showing you the shiniest parts of themselves at first and so, naturally, it can be hard to detect their flaws. Though, there are some signs with skulls and crossbones stamped all over them that you can pick up on if you know what to look for. While recruiting team members if you notice any of the following in your interactions with them, run as fast as you can in the other direction:

- Not reliable
- Not responsive
- Not accountable
- Doesn't seem to be motivated
- Produces poor quality work
- Often seems negative
- Argumentative
- Prefers to only work on their own
- Runs away from challenge and growth opportunities
- Isn't truthful or honest
- Talks down to and easily criticizes others

**PRO TIP:** if you are unsure whether a person is a good fit or not, give them a small project-related task (e.g., research on a potential client) to do and see how they perform in terms of time management, attitude, and quality.

## Setting a Baseline

Once your team has been formed, it'll be immensely important to establish expectations. Without hashing out these expectations early on, you may find that your team seems to be on different playing fields, aiming for greatly different targets.

True team unison is hard to achieve, but possible if the appropriate measures are put into place. Everything you do on your team should be intentional and done with great purpose. Doing things in this way forces your team to be cognizant of where they are, where they're headed, and what's required to get there. To get your ducks in a row, try the following suggestions.

## Determining Roles

While the roles people play on each team might look vastly different, at the very least there should be a team lead/project manager (PM) and a client liaison within your group. Keep in mind that not everyone has the right skills to be successful in these roles and it would, undoubtedly, be too much for one person to take on both.

The PM should be someone who is organized, a good planner, is good at tracking and measuring progress, and ideally has some project management experience or training. This person will have a strong understanding of all the necessary deliverables, when they're due, and which milestones to set up in order to ensure the team stays on track.

On the other hand, the client liaison will serve as the link between your team and client stakeholders. This doesn't mean that they will be the only person to interact with your client, in fact, rather the opposite. The liaison will simply represent your team as a unified voice to get things like meetings in motion, questions asked of the client through written channels, and being the person to respond to client requests and questions (with the group's input). The liaison should be someone who is comfortable communicating with managers and executives and one who is able to maintain a cool and professional demeanor at all times.

During your first team meeting, your group should work together to determine which other roles make sense given the skill sets present, your group dynamic, and the group culture you hope to uphold. For some inspiration, you can check out [Harvard Business Review](#), [Carnegie Mellon University](#), and [Usability.gov](#). It's important to note that regardless of what role each person takes on, every member of your team is required to contribute to written deliverables and to make equal oral contributions to the presentation.

## Communication channels

How do you all communicate with each other? Whether in-person, through WhatsApp, email, or anything in between, your team will need to determine an internal and external communication strategy. This doesn't mean that only one channel can be used, but it'll be important to discuss the following:

- What is everyone's preferred method of contact?
- Which channels are off limits?
- Will we uphold business hours? If so, what will they be?
- What forum is best for collaboration?
- When and how should we talk about team status updates?
- How will team deliverable reviews be conducted?
- Where should we store, revise, and track documents?
- What is the most appropriate forum for asking ad-hoc questions internally?
- What channels will be used to connect with our client?
  - What is the purpose of each channel?

**Define a statement of success**

It sounds really simple, in fact, so simple that most teams fail to ever consider what success looks like. Time and time again, groups dive right into the work without ever asking “Why are we here?”, “What do we hope to achieve?”, “What should the start, middle, and end look like?”. You can get started with work and quickly realize that things seem a bit off. Most groups chalk it up to just trying to get things in flight or perhaps a clash of personalities. What these groups fail to realize is that members might unknowingly be aiming for different targets.

**Checkpoints and Working/Auditing Sessions**

Without a doubt, your team should set up a schedule of internal stand ups, client check-points, group working sessions, and team read throughs. The frequency of each of these will be up to your team’s discretion, though it is advised that your team convene several times a week for brief stand up meetings (no more than 15 minutes) to discuss status, progress, roadblocks, outline questions, and next steps.

**Sign an internal contract**

There’s nothing that says, “I take this seriously”, more than signing a contract. You do it when becoming an employee, buying property, getting married, even when setting up a phone plan. Your team contract should contain all of the expectations

that have been established – from attendance at meetings, to notification deadlines, to expectations around work contributions – and have an indication that everyone is in agreement and literally on the same page (with signatures). It essentially will act as your playbook, the guiding point to bring your team to success or help to reel everyone back in when things go awry. The contract can be prepared before the entire team is formed, but ideally, will be a group effort and possibly your first real shot at collaboration. Check out [Chapter 19](#) for templates to help get you started.

## Next Steps

By this point you've covered a lot of ground, but there's still quite a bit to be done to be 'winning' ready.

## Final Admin Stuff

Consider having a group email address. Doing this will keep project related things out of your personal inbox, and will allow your team to interact with the client on a more streamlined front. Your team can easily set up a Gmail account or work with CCS to get a Ryerson email address.

Also, once your team has been fully formed, have your group registered with the department by emailing [trsitm@ryerson.ca](mailto:trsitm@ryerson.ca) with the names, student numbers, and contact information for

each group member. Be sure to loop your team in on the email and if you've secured your client already, document that in the email.

## **Strengthening Your Team**

It'll be good to spend some time getting to know each other. You'll be working quite closely together for 8 months, so it's worthwhile to find out what makes each other tick, what motivations are, what pressure points there could be. Use the summer months to not only get yourselves ready for an intense course, but to also spend time with each other on social/casual/fun outings.

## **Creating Your Team Profile**

It comes by no surprise that with little/no work experience and simply being labeled 'students', Capstone teams are often up against a great challenge in finding a client. Your team profile document can be used as a tool to help your team to sell itself to potential clients.

As you complete the Team Profile template found in Chapter 19\*, consider the following as suggested by "Freelancing for Dummies":

- What education might be required?
- What sort of experience might clients be looking for?
- Would any certifications be helpful?
- Which skills or special talents could be most

beneficial to the project?

- What value can my team bring to the table?
- Why would a client be better off by ‘hiring’ us?

## 3.

# Chapter 3: Securing a Client

Finding a client can be just as awkward, if not more. It's akin to being on a first date, you're trying to impress, maybe they're trying too or looking to see what you have to offer first. Being proactive means you've already started putting feelers out there to see where there might be potential client connections.

Surely you're ready to skip this chapter altogether, but not so fast. There are a few key things you'll need to know before signing on the dotted line with a company. Like a date chaperone, we're here to keep you going in the right direction, so stay for the ride.



## Where to Look

The simplest first step is to start with who you already know. As *Freelancing for Dummies* explains, “Where miners find one diamond, they know they’re likely to find others. The same is true of clients [or employers]. It’s a lot easier to keep digging in the same spot than to blast out a whole new mine.”<sup>1</sup> *Freelancing for Dummies* (p. 142). Hoboken, NJ: John Wiley & Sons. Hopefully you’ve kept in touch with past managers, if not, it’s a good practice to start now. Literally, right now.

1. Drake, S. M., Recorded Books, & LLC. (2013). Finding Clients. In

**Hmm, we haven't been in touch. How do I initiate a contact?**

Send them a thoughtfully handwritten note of gratitude, explaining what you most appreciated about working with them, how they helped you in a specific way, or what you gained from being part of that company. A birthday or greeting card for a [silly holiday](#) will work just the same. Or a simple email following up on something personal that you remember, such as, “Where is your son headed off to now that he’s graduated?” or “How was that xyz concert you attended? I heard there was a really good turnout.”

No matter what you send, ensure that you also include a statement explaining that they’ve been on your mind and you’re hoping to work with them in a different capacity. Don’t forget to include a call to action like, “Perhaps we can have lunch next week to chat about a new project I’m gearing up for. Send me an email to let me know if you’ll be free.”

Now that your arts and crafts are done and the letters have been sent out, do not sit and wait. It’s time to keep your strategy game strong, and look out for other opportunities.

**Connect with friends, family, current and former coworkers to ask for a referral.**

Gently encourage them to put in a good word for you at their company or within their networks. Be sensitive though, not everyone feels comfortable putting in a referral, so let the person

you're asking know why/how you'll benefit and reassure them that if they don't feel comfortable doing it, it's okay too.

If you have a particular company in mind and have a connection there, start by making a specific request, "I have an exciting new project that I'm hoping to collaborate with YYY company on. [Insert brief project description]. Do you have any contacts there that you think would be interested in exploring this with me?". If you don't get much traction, don't be afraid to ask the person if they know of anyone/any other company that would be suitable to connect with. If you end up getting referred, it's super important to send a formal, personal note of thanks right away. That person, after all, has taken the time and effort to make a connection for you and has put their reputation on the line.

Finding a client is a time-consuming process. And sometimes the clients you have contacted have a few concerns, but are reluctant to tell you for various reasons. Their responses to your request are often vague and uncertain, which give you a glimmer of what you think is hope. Don't be tricked. You need to actively look for a client from as many possible sources as possible. Additional sources you could try are:

- Connect with alumni
- Cold calling. Yes, this one is challenging, but still worth a try.
- Take up any opportunity to meet people. Attend networking events, workshops, corporate functions, etc.
- Use social media to put out feelers in your networks

- Research the client profiles supplied by the department. Contact them at [trsitm@ryerson.ca](mailto:trsitm@ryerson.ca)
- When in meetings with any professionals, strike up casual conversations with those at the table to find out more about what they do

**PRO TIP:** The course coordinator is partnering with the TRSM Career Hub to solicit clients. The project information will be posted on the Google Group Forum. So keep checking the updates on the forum.

## What to Look For

As far as client requirements go, the client you choose will need to meet the below criteria. You can and should use these as a first stop to help you sort out the weeds from the actual prospects.

- Has its headquarters located in Canada
- Has an active interest in the project
- Has capacity and willingness to work with your team actively for 8 months
- Is willing to share confidential information with you
- Can and will give you access to the right people
- Is open to using information technology to improve its operations

Once you've found companies to connect with, there are many things to consider when engaging in initial discussions with them. Your project has to be process oriented, with goal(s) that involve multiple tasks and stakeholders. The end result of your team's work will involve a complete IT solution (ex-enhancement of existing features, data migration, website design/enhancement, improving the speed of a network, etc.). [See here](#) for examples of 2 past projects. Also, be sure to check the [Capstone website](#) periodically to see a list of clients previous teams have studied.

The process itself doesn't need to be IT related (can be a business process), there just needs to be the opportunity to equip your client with the right tools/technology that'll help them continuously and systematically perform better.

As well, you'll need to carefully gauge the following when interacting with potential leads:

- Type of project
- Scope of the project
- Level of support being offered
  - Ex- sponsor, response times, contact person, and frequency of communication
- Client size

For those of you thinking that it'll be easy peasy running with a Mom and Pop shop or a better opportunity flying with a large corporation, you should at least know what you might be up

against in both cases (see below) . One isn't necessarily better than the other, it just simply boils down to team preference and the project opportunity offered.

|             | Large Companies                                                                                                                                                                                                                                                                                               | Small Companies                                                                                                                                                                                                                                                                                       |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pros</b> | <ul style="list-style-type: none"> <li>• Typically public firms with easy access to information</li> <li>• Has identifiable competitors</li> <li>• Has a strong focus on business process improvement</li> <li>• Runs a well-established IT department</li> <li>• Sees the value of IT in business</li> </ul> | <ul style="list-style-type: none"> <li>• Easy access to senior management</li> <li>• Simple process/system to analyze</li> <li>• Quick approval times</li> <li>• Usually more informal and approachable</li> </ul>                                                                                    |
| <b>Cons</b> | <ul style="list-style-type: none"> <li>• Multiple levels of approval needed</li> <li>• Slow pace getting tasks done</li> <li>• Complex systems/processes to analyze</li> <li>• Challenging to get access to the right people</li> <li>• Many opinions and ideas to sift through</li> </ul>                    | <ul style="list-style-type: none"> <li>• Typically private firms with hard to access information</li> <li>• Not willing to provide financial information</li> <li>• Challenge to perform industry analysis</li> <li>• Small/no IT department</li> <li>• Value of IT may not be appreciated</li> </ul> |

So, you might be wondering what the right client ‘looks’ like after all. The following table should hopefully help you know what to expect and what to look for.

| The Ideal Client ...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Though, more often than not ...                                                                                                                                                                                                                                                                                                                                                                                                             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Has a clear idea of the business problem</li> <li>• Has a business problem that is manageable within an eight month period</li> <li>• Is focused on solving the problem</li> <li>• Is able to provide information on business operations and IT</li> <li>• Maintains regular communications with students</li> <li>• Is a strong advocate for students' work</li> <li>• Respects your time</li> <li>• Listens</li> <li>• Helps to set realistic expectations</li> <li>• Gives clear direction</li> </ul> | <ul style="list-style-type: none"> <li>• Isn't sure about the real problem at hand</li> <li>• Isn't able to keep pre-arranged communication schedule</li> <li>• Is hard to get a hold of/unresponsive</li> <li>• Requests extra tasks in addition to project reports</li> <li>• Changes scope on a whim</li> <li>• Is reluctant to provide the needed information</li> <li>• Goes through restructuring or operation disruptions</li> </ul> |

## Pitching to Prospects

Even if you've found an ideal client, it won't necessarily be a love match right away. Oftentimes, clients need some 'romancing'. They won't always see the Capstone project as a mutually beneficial opportunity, so you'll need to do a little work to sell your skills with charisma (unlike a greasy used car sales person).

# Oil leak??



## That's just sweat from all Of that horsepower

Of course, before you're off showing people the sparkliest side of you, you'll need to have a good handle on what the project is all about. There's no sense trying to schmooze with a client if

you're even unsure of the details and goals. Why not take your knowledge for a spin?



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<https://pressbooks.library.ryerson.ca/itmcapstonesurvivalguide/?p=44>

Feeling ready to pitch this bad boy to potential clients? Great! You can deliver your pitch in one of two ways. Which option is suitable for you?



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<https://pressbooks.library.ryerson.ca/itmcapstonesurvivalguide/?p=44>

Regardless of which option you pursue, your team will need to do significant prep to learn about the company, the people who will be receiving your pitch (do a little LinkedIn stalking), the potential business problems the client may have, and how your Capstone project can respond to that problem. Knowing these details will put your time in a prime position to win that 'business'.

Speaking of winning the business, you'd be remiss to step away from a pitch without actually asking for the business. You could

have just delivered a glorious pitch and without a call to action, there's no encouragement for ... well ... action. You'll need to actually say the words, "We would like to work with you on this project."

You may be ready to sell this project like nobody's business, but are still fretting over the proposal itself. Unsure of where to start or what it should look like? In *The Best of Smashing Magazine*, professional Web Designer and author, Cameron Chapman, explains, "Exactly how you format your proposal is up to you, but there are certain parts that virtually every proposal should include. Feel free to get creative in the design of the proposal, but remember that the primary purpose is to convey information. Anything that interferes with the readability of the document should be cut."<sup>2</sup> For additional resources on pitching and proposals, check out [Part 5](#).

## Sizing up a Project

You've finally found a client, yay! You're thinking, "Yes, I can graduate now!" and they're thinking, "Whoop! Free consulting services, holla!". Both parties are ready to sign the contract, or in some very adventurous cases, just dive right in, but hold the phone. Has your team actually assessed the project you'll be jumping into? Knowing what you're getting into and what you'll be up against is extremely important. Remember, you're

2. Smashing, M. (2012). Pitching Like a Pro. In *Successful Freelancing for Web Designers* (p. 48). Smashing Magazine.

supposed to be setting yourself up for success, not a game of Russian Roulette.

The hope is that across several clients, you'll be presented with a few project opportunities to choose from. The projects presented to you can bring an array of benefits including a possible future business/work opportunity, an opportunity to put your knowledge and expertise into practice in a real context, a chance to learn new or improve current skills, and a fun/enjoyable work experience. Not every project that comes your way will carry all of these benefits, but if any one of them does, you probably have a winner. For the rest that won't help you achieve all of these benefits, you'll need to decide whether or not it's still worth it to pursue the opportunity. There may be other factors that still make it worth your while. Have a go with the Dummies method<sup>3</sup> of rating a project to help guide your decision. You will, of course, need to modify the table to include the criteria that are most important to you (hint: money shouldn't be a factor).

3. Drake, S. M., Recorded Books, & LLC. (2013). Evaluating Jobs and Projects. In *Freelancing for dummies* (pp. 186-187). Hoboken, NJ: John Wiley & Sons.

## ACTIVITY

**Trying a logical approach**

One fallback position I sometimes use in deciding on a job is the put-it-on-paper approach. Take the following steps, an example of which is in Table 12-1:

**1. Down the left side of a page, write the four potential benefits of any project: money, additional business, new or improved skills, or fun.**

**2. Read each one, and rank the project from 1 to 5 according to how much or how little it will provide the benefit.**

Use 1 as the least favorable and 5 as the most favorable.

**3. Add up all the numbers.**

If a project doesn't score at least 5, strongly consider turning it down.

| <b><i>Desirability Factor</i></b> | <b><i>Rating (1 Is Lowest; 5 Highest)</i></b> |
|-----------------------------------|-----------------------------------------------|
| Money:                            | 3                                             |
| Future work:                      | 3                                             |
| New skills:                       | 2                                             |
| Fun:                              | 4                                             |
| <b><i>Total rating:</i></b>       | <b>12</b>                                     |
| Maximum rating possible:          | 20                                            |
| Minimum rating acceptable:        | 5                                             |
| This project:                     | 12                                            |

Items that scored a 4 or 5 are noteworthy things that deserve attention. If anything was rated a 2 or below, it's an indication that the project will be quite unfavourable in that area. While the minimum **acceptable** rating should be 80% of the maximum possible score, it'll be important to check that the pros of

pursuing the project outweigh the cons. Using the concepts discussed in [this article](#), get your team together to hash out on paper every possible perceived positive and negative of taking on the project. Is one side literally heavier than the other? This is something to think about.

As a final stop, do a ‘gut check’. Imagine that your team has accepted the project and it’s now one month into the school term. What are the possible results of your decision? How do you feel about that? Now, imagine that your team rejected the project and ask yourself the same questions. Do you sense any relief or regret? These could be good indicators of your true thoughts. If you have any doubts at all, it’s always a good idea to check with the [course coordinator](#).

## Pitfalls to Avoid

During initial interactions with clients, don’t meander through conversations without paying attention to what you’re hearing, what you’re observing, and the implications both can have on your team. You should have your Elmo eyes on, looking out for any warning signs that indicate ‘Danger Ahead’. Some red flags that should get you thinking twice are:

- Aggressive and negative attitudes
  - The client speaks negatively about other Capstone groups they’re interviewing, employees they have, or other companies

- You're constantly pushed to prove your value
- Treat themselves as Gods, and expect you to make them happy at all times
- Unrealistic expectations
  - Overloading you with data without taking the time to explain things to you and give you context
  - Recklessly throwing in extra tasks (scope creep) without consideration for time, skill, and capacity constraints
- Lack of appreciation of the academic course requirements
  - Not flexible. Client is insistent on a particular solution/software/approach in the project
  - Lack of collegial and cooperative working culture
- Unclear understanding of issues at hand
  - Little or no budget for implementation
- Chaotic and disorganized
- Client asks you to develop an overly comprehensive proposal without any guidance

- Not flexible. Insistent on a particular solution/software/approach before you can even perform any analyses
- Client who change their mind quickly, without communicating changes or understanding the implications changes can have
- Talks of restructuring or role changes are on the horizon
- No thoughts or cares about a plan to move forward after your project is done (who runs with your project once you've completed requirements? Implementation? Maintenance?)



## Saying 'No'

You're considering dropping the 'n' word. No need to get into a panic. If your team is considering rejecting a project, by this point you all will have put considerable thought into opportunity,

including doing the previous assessments and asking advice from others outside your situation (ex- professor, friends, professional in the field, alum, etc.). Whichever reasons caused you to arrive at this thought, you want to give yourself time to evaluate your thoughts.

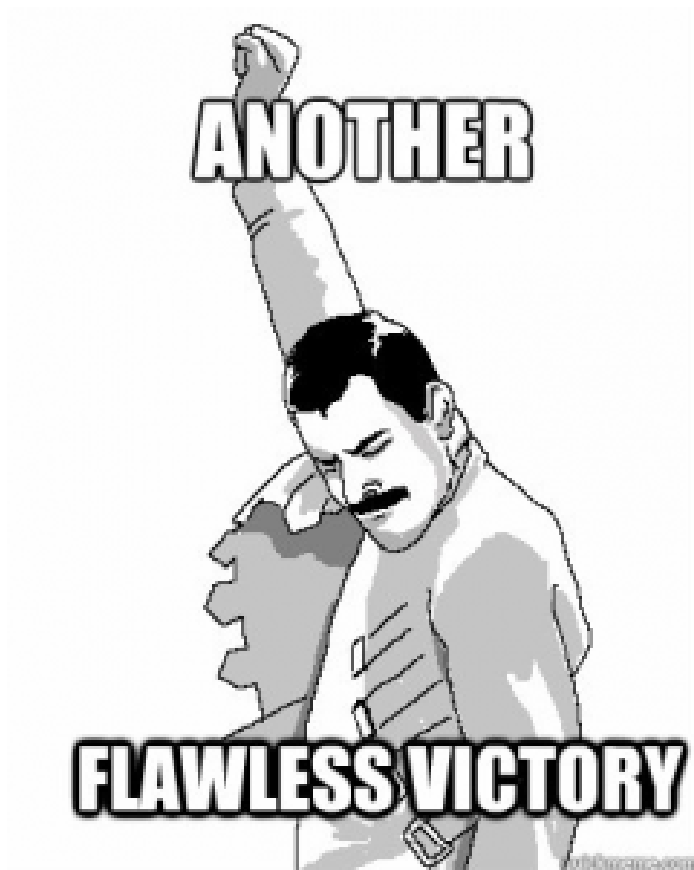
Often students feel the pressure to respond right away. Only benefit can be had by telling the client that you and your team will need some time to discuss and review the offer. It won't make you look bad, in fact, it shows wisdom in wanting to take time to reflect, observe, and come to an un-rushed conclusion. But be sure to let the client know when they can expect to hear back from you, otherwise, you may just lose the opportunity.

If saying 'no' feels right to your team after all, you can let the client know in person, by email, or by phone (not in a voice message) as long as you cover:

- A statement expressing how grateful you all are for the time they've spent exploring the opportunity with you
- Why you're rejecting the offer (ex-project/company isn't a good fit, received a more suitable offer, team doesn't have the right skill set, etc.)
- If you know of another team that might benefit from the opportunity, refer them
- Wish them the best in finding a student group match
- Leave contact details in case they have any further questions

## Saying 'Yes'

Found the right fit for you? Congratulations! This is a big deal \*insert victory dance\*. Let your client know in writing that your team has accepted the offer and follow the action items outlined in [Part 3](#).



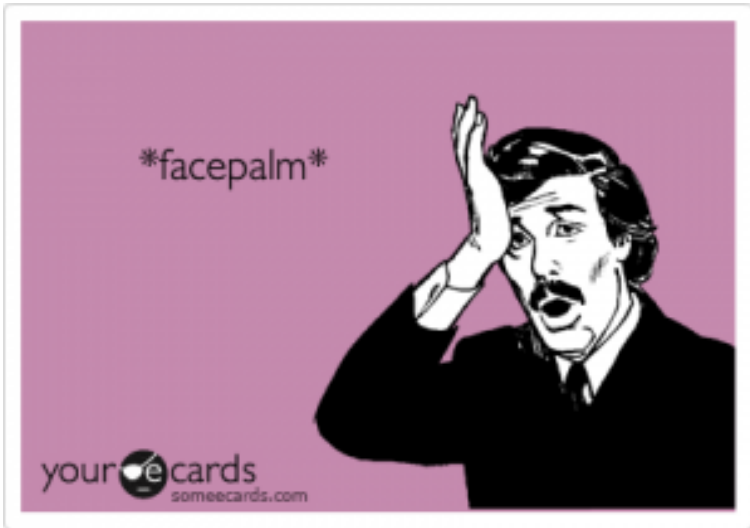
## 4.

# Chapter 4: Creating Effective deliverables

Observation over the past decade has shown that Capstone students often struggle with producing quality deliverables. In spite of their best efforts, student teams can be greatly challenged in producing cohesive, polished, and informed reports. No doubt, the biggest contributing factors for these challenges are:

- Lack of experience producing professional deliverables
- Not being entirely sure of expectations
- Poor time management
- No true collaboration (it's should be more than divide and conquer)
- Not following the right process

Most challenging of all is that these outputs are client-facing. The people reading through student reports could possibly be averted from being their future employers. Yep. The struggle is real! Fortunately, this survival guide is here to help you avoid numerous facepalms.



## Understand What's Expected of You

Among the things your team does before the course starts, there are 3 things in particular that you'll find greatly helpful in setting up the road to winning.

1. **Know what the deliverables are and when they'll be due.** Take some time to look at the deliverable

below map and read through the [course outline](#) as a team. Do a [workback schedule](#) to determine a rough schedule for the work that you'll be doing.



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2. **Understand deliverable requirements.** Run through the ‘[Guidelines for the Group Project](#)’ document and for each section (ex- intro, performance assessment, gap analysis, etc.) discuss what that that section should address, why it’s important or why the reader should care about it, and what tools or information will be needed to effectively respond to that section. It’ll also be worthwhile to check out samples of exemplar deliverables so that you know what to expect.
3. **Brush up on your knowledge and skills.** Let’s face it, it may have been a long time since you victoriously ran through that managerial finance course or since you plotted out a swimlane diagram. You were required to take all those courses for a reason – simply to prep you for the Capstone course. Take some time before the course starts to get refreshed on the following:

- Agile project management concepts

- BPMN
- Requirements gathering and analysis
- Cost-benefit analyses
- Feasibility analyses
- Project-specific knowledge (e.g., security, marketing)

## Be United in All Things

Reports submitted to the school and to clients can be disjointed and have many ‘voices’. Yes, people need to take ownership over the report parts they’ve been given and each person has a unique writing style, but that doesn’t mean that readers should be able to pick up on the various voices speaking in a report. Teams need to be united in both the report and presentation, not fragments of parts sewn together. It can be really distracting and impede the flow of the document.

This is your chance to practice real collaboration by working as a team to come up with an outline of ideas for each part and doing team read throughs before deliverables are due. Aim to have your deliverables done 3 days before the due date and carve out several hours to run a team read through and revision session. At this session, group members should take turns reading out loud sections they have not written while 1 or 2 people document the group’s feedback and questions. Then each member should silently read through the entire deliverable and use Google Doc

or Track Changes features to document additional feedback. Finally, the team should discuss all of the feedback and make revisions together.

## Solutioning

Time and time again, teams will start coming up with a solution well before a clear picture of the problem is outlined and the necessary assessments are made. This presents a huge issue and risk to your project since it's almost impossible to make informed decisions and come up with relevant, realistic, and beneficial suggestions before you have all of the right information. The key to mitigating this challenge is to follow the consulting process outlined in [Part 2](#) and to make sure your team has done the appropriate research. Don't underestimate the power that research yields.

When the time is right to finally showcase possible solutions, expound on no more than 2-3 and come armed with the pros, cons, and gaps in each solution.

## Formatting

**Formatting.** *does*. **matter**. Though, focusing on formatting should be saved only until the very end, well after the content

has been laid out, you'll still need to make sure your design and other elements are consistent and not distracting. You want to create a reading experience that helps the reader along, not one that smacks them on the face everytime white text is put on a cyan background (you know who you are).

At the very least, your report should have:

- A cover page with all of the essentials (hint: this isn't the place to lay out other courses you've taken or mention a recent award you've won)
- Page numbers that are consistently in the same spot on every page apart from the cover page where there shouldn't be a page number
- Proper headings and subheadings
- Paragraph breaks when thoughts change. Paragraphs that are full page make people's eyes water with resentment.
- Appropriate line spacing between lines and paragraphs
- Legible diagrams. If the reader needs to zoom in to 500 then somethings seriously wrong.
- References to diagrams whether in the main body or in appendices. Do not just throw in a cool diagram and expect readers to know what to do with them.
- Font size 12 for normal text
- Font type that's easy to read. Do not make your entire document Curlz MT. In fact, no part of your reports

should have this font. Be professional, people!

- If using scales of any sort, define what the scale is (ex- 1 means x and 5 means y)
- Colours that aren't distracting. Colours are okay to use as long as they're subtle and help to emphasize, not take the reader's attention away.



## PART II

# PART 2 - Consulting U: The Rundown On IT Consulting



PART 2

# CONSULTING U

The Rundown On IT Consulting

## 5.

# Chapter 5: Intro to IT Consulting



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<https://pressbooks.library.ryerson.ca/itmcapstonesurvivalguide/?p=127>

What does Consulting look like? Flying on a plane, sitting in boardroom, dropping a bunch of fancy terms, handing out expensive advice? There's a great deal more to it than that! It's all about giving professional guidance as the expert. Clients hire you as an IT consultant because they're looking for a level of expertise on improving processes, introducing new systems, solving business problems, etc. that they can't find from within their own company.

To equip you to be your best consulting self, we take some time in Part 2 to give you a run through of the 6 phases that are essential to IT consulting using a spin on the [W5H](#) method by exploring for each phase:

- What it means
- When it happens
- Who it involves
- Why it's important
- How to navigate it

You can consider this like 'Consulting 101', what you need to know about all things consulting to set you up for success.



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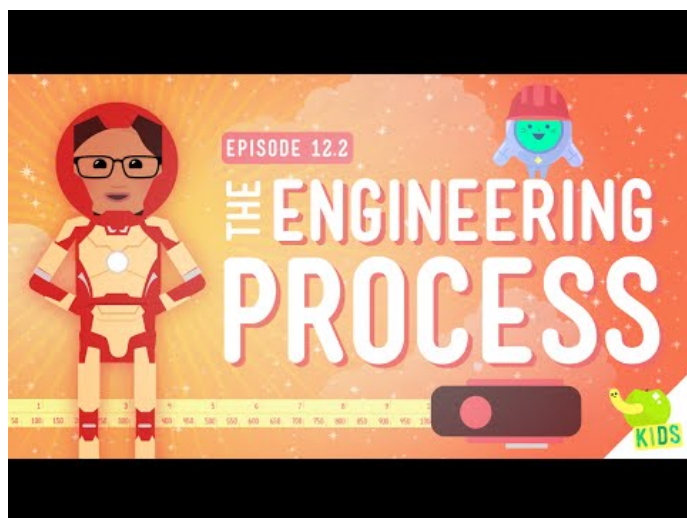
These are the general phases that you will go through as part of the Capstone project, be it in a more staggered waterfall approach or using an agile method. You might spend more time on one phase or another, but each one contains crucial steps to gather the information you need to produce successful and effective deliverables for the course and the company you'll be working with.

You might be surprised to hear that the IT consulting process is very similar to engineering design. While you aren't creating a tangible product, you are in a way, acting like an engineer who will be using skills, knowledge, and creative problem solving prowess to come up with ideas that'll fix something. The following fun videos on engineering design will give you a preview of what you can expect to delve into in the remainder of this section.



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6.

## Chapter 6: Discovery Phase



## WHAT Discovery means

The Discovery phase sets the landscape of your project in way. This is when you'll be finding a suitable client, determining an appropriate project, and as Arrk Group says, "when you will work alongside your team in an effort to establish a deep understanding of what [the] expectations of the project really are."<sup>1</sup> Remember all of that baselining, goal setting, and sizing up discussed in Chapters 2 and 3? All that wonderful stuff happens right here in the discovery phase.

## WHEN Discovery Happens

For students who will commence the Capstone course in the fall, this phase will take place during the summer months before the course start. Discovery activities will often be the starting point whether using a waterfall or agile project management process. However, since this phase entails the most rudimentary elements of your project, it's not something you'll necessary want to cycle through several times. The Discovery phase is what kickstarts everything else. Nobody wants to look for another client or project after they've been secured already, right?!

1. Arrk Group. (2018). The Importance Of Getting The Discovery Phase Right. Retrieved from <https://www.arrkgroup.com/thought-leadership/the-importance-of-getting-the-discovery-phase-right/>

## WHO Discovery Involves

Simply, it involves your team and potential client stakeholders. As you go through the process described in [Chapter 3](#), you may in fact interact with many possible clients as your team decides on who will be the most suitable one to pursue the Capstone project with.

## WHY The Discovery Phase Is Important

Since this phase is the very thing that kickstarts your project, it's important to start off on the right foot. It's the starting point on which you'll build the foundation of your project. We all know what happens when you try to build a house on quicksand!

## HOW to Navigate Through Discovery

While voyaging through the Discovery phase, your focus will be on two key objectives:

1. Find a suitable client
2. Find an appropriate project of interest

As a group, use your network of contacts (ex. professionals you have connected with at networking events, your manager from a co-op internship, professors, family members, or friends) to find

a company that would be a suitable client for the project. While it may be a scary task, know that over 400 companies have partnered with students on the Capstone project over the last 10 years. Be encouraged by the fact that countless companies want to be involved and are eager to see the benefits your project can bring as a result of agreeing to partner with your team. Refer to [Chapter 3](#) and the many resources available in [Chapters 19-20](#) to help guide your conversation along with potential clients.

Once you find yourself a suitable client, start to identify the things you need to understand, such as the industry, client background, and the problem you may need to solve. Identify the key contact (and secondary contact!) you will have at the company and their availability. When possible, get to know the culture and environment in the company and how they work in these early stages. Know where the company is located and where you'll possibly be commuting to for meetings. This could dictate how you approach your work.

The more information you can draw from initial conversations with the company, the better you will be prepared for future phases. It is important during this phase to be assessing whether or not this will be a suitable client relationship. Look for red flags that may determine the client may not be ideal, such as lack of response from stakeholders or lack of willingness to share information. Set yourself up for a win by ensuring open communication with the client (more on that in [Chapter 13](#)), including getting appropriate permissions to access data which will allow your team permission to analyze and problem solve.

The second objective of this phase is to find a project topic

or opportunity of interest for the group to focus on. An ideal project topic is a problem area or an inefficient process that can be improved by leveraging technology to deliver value to the company. Use your research of the company and industry and leverage conversations to understand the client and their key business processes, problems, and areas of opportunity. As a team, be conscious of the important questions that you need to be asking and the data you should be requesting. Just when you think you've asked the last question, find another one to ask.

To help generate the understanding you require of the company, here are examples of information and data that you can collect about a company, both publicly available and available by request.

Typically available online:

- Company history
- Vision statement
- Mission statement
- Financial reports
- Press releases/public announcements
- Customer ratings and reviews
- Shipping and return policies

Ask your client for:

- Financials
- Key performance indicators

- Process metrics
- Inventory records
- Process maps
- Organizational chart for the department you're looking at
- System manuals
- Reports on strategic initiatives
- Documentation on user tasks/process flows

7.

## Chapter 7: Definition Phase



The image is a YouTube video thumbnail. It features a cartoon illustration of a girl with glasses and a yellow hard hat, holding a yellow rope. To her left is a small, round, green robot with a smiling face. Above the girl is a small, pink, cat-like creature. The background is a warm, orange-brown color with clouds and a large yellow sun. The text 'EPISODE 18.1' is in a blue box. The main title 'DEFINING THE PROBLEM' is in large, white, bold letters with a pink outline. In the bottom right corner, there is a small green logo with the word 'KIDS' in white.

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<https://pressbooks.library.ryerson.ca/itmcapstonesurvivalguide/?p=132>

## WHAT Definition means

Just for kicks ....

**Def·i·ni·tion** /defə'niSH(ə)n/ – to determine or identify the essential qualities or meaning of, to fix or mark the limits of, to make distinct or detailed especially in outline.<sup>1</sup>

That obviously was a wisecrack (who wouldn't want the definition of 'definition'?), but we can still glean and apply a dictionary's description of the word 'definition' to your Capstone project. The Definition phase is all about carving out what the real business problem is and subsequently, what the expectations are around solving the problem.

## WHEN Definition Happens

This step or phase happens after the Discovery phase. It's also something you don't want to have to do often or iteratively because you can't start any analysis and you definitely don't want to start solutioning before the actual business problem has been defined.

1. Merriam Webster. (2018, April 24). Definition of define. Retrieved from <https://www.google.com/url?q=https://www.merriam-webster.com/dictionary/define&sa=D&ust=1525355953824000&usg=AFQjCNGORQ4xmDsaO6DXpgkE8K6SowGmGg>

## **WHO Definition Involves**

The Definition phase entails you and your chosen client working together to set a boundary around the business problem that will be solved. Typically, you can expect to be engaging with the project sponsor, process owners (managers), those who participate in and complete the given process, and any other stakeholders who have a vested interest in your project.

## **WHY The Definition Phase Is Important**

How do you know when your team's work has been successful? At what point is it safe to say that you've met the client's needs? How do you know which processes and departments should be involved in your project? The answer to all of these is quite simple – you need to first have a clear definition of the problem you're trying to solve. The Definition phase sets the tone (and often the pace) of the rest of your project.

## **HOW to Navigate Through Definition**

Find a client to partner with – check ?

Determine a project to work on – check ?

Now that you've cleared through the Discovery phase, it's time to build the blueprint that the remainder of the project will be based on. During this phase, your group will determine the following:

- Project scope
- Problem definition
- Client expectations
- High-level requirements/business needs

You and the client will formalize the project by including the outcomes of these activities in a Statement of Work (SoW). As [Chapter 3](#) explained, the SoW acts as a binding contract between your group and your client. It is extra important to be in alignment with your client during this phase, agreeing on the expected/desired outcome and accomplishments over the project lifecycle.

With your primary client contact, define the individuals and stakeholders that are appropriate for the project needs. For the best results, engage the potential stakeholders early to help them understand their involvement and the time commitment. Stakeholders can include directors, management, users of the information system(s), and others that are impacted by the specific process. Rarely are projects completed with only one stakeholder at the client company. Expect to connect with up to 7 stakeholders. Note, if you have more than 10, this is a red flag that you may be trying to solve a problem that is too large.

Be cautious and be aware of potential red flags around the

problem topic area as well. A client may approach you with a problem, but be critical of understanding it before agreeing. A red flag to look out for is if the process being focused on is too large, or crossing multiple systems. If this is the case, consider zooming in on a single sub-process that is problematic and can be improved given the Capstone course constraints (time, effort, ability).

For the sake of both your group and the client, be diligent in clarifying the project expectations and deliverables. This is critical to avoid surprises along the way and unmet expectations at the conclusion of the project. Be clear on what will be done and even more clear about what won't be done, and hold the client to it as per the contract you've signed with them. If new requests arise during the project, refer back to the SoW with the client and discuss accordingly. "Be careful not to over-promise at this stage. Once you set an expectation, you must do your very best to meet it or exceed it."<sup>2</sup> Many teams before you have fallen into the trap of thinking that the client will automatically figure out that the team wouldn't be involved in the implementation of the project. Don't be like those teams!

Once you and your primary contact are aligned on expectations, it is recommended to have a kick-off meeting with all stakeholders. This meeting will allow the team to come together and review the project details. Use this meeting to ensure responsibilities are clear and agreed upon. It is also an excellent opportunity to receive input on high-level requirements,

2. 9Lenses. (2017, June 27). 7 Key Stages of a Consulting Project. Retrieved from <https://www.9lenses.com/consulting/7-key-stages-consulting-project/>

foreseeable challenges that may be encountered, and any noteworthy changes happening within the company.

At the end of the Definition phase and after the kick-off meeting, there should be a sense of momentum as the Analysis phase is set to begin. The mission is clear, the stakeholders are onboard, and it's time to absorb yourself in research and data to investigate the problem.

8.

## Chapter 8: Analysis Phase



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## **WHAT Analysis means**

In the Analysis phase, your team is earnestly working to understand the current state of things. You'll be outlining the as-is both within the company and in the markets outside of the company.

## **WHEN Analysis Happens**

The Analysis phase will always happen after you've defined the problem. Quite often you will start this phase in the first few weeks of the 90A semester. Remember, problem identification is an iterative process, as mentioned previously, the capstone project is an agile project which entails multiple iterations of problem identification and solutioning. However, as the project moves along, the problems/issues should be clearer and the focus will be more on the forming a solution.

## **WHO Analysis Involves**

Involved in this phase will be your team, of course, and any stakeholder who will be able to provide you with client related data. You will also be indirectly interacting with third parties

external to your client while doing research (ex- Industry, market, news research, etc.).

## **WHY The Analysis Phase Is Important**

Capstone students and working professionals alike, often try to jump to a solution before they've understood all of the variables. We've all been there before, a best friend groans about a problem they're having and we silently (or sometimes verbally) run through an easy fix to the issue even before they're finished explaining the whole story.

Solutions to a business or even a personal problem is rarely an easy fix. Rushing through a solution just to close the gap (or quiet a friend) may bring quick benefits, but most likely these are just band-aid solutions that don't have staying power. Why? Because you didn't understand all of the factors at play. Knowing what's currently happening and why can have huge implications on the solution you choose.

## **HOW to Navigate Through Analysis**

Let the following guide you throughout the analysis phase. You will have already answered the first two questions by this point, but remind yourself that the focus of your project is not just on

finding a problem, but the critical work is to search for WHY the problem is happening.

### QUESTIONS TO CONSIDER

What is the problem or need?

Who has the problem or need?

Why is it important to solve?

[Who] need(s) [what] because [why]<sup>1</sup>

The analysis phase may be the largest aspect of your Capstone project (along with solution phase). The objective of it is to conduct adequate research, bring all of your data together, and analyze the findings so that you can begin working towards a suitable solution.

As part of this phase, your team will perform all preliminary research activities and leverage resources available (ex. textbooks and library/online resources, case studies, etc.). Get insights on both direct and indirect competitors using strategies and techniques you've learned throughout the BTM program.

1. Science Buddies. (2018). The Engineering Design Process. Retrieved from <https://www.google.com/url?q=https://www.sciencebuddies.org/science-fair-projects/engineering-design-process/engineering-design-process-steps%23theengineeringdesignprocess&sa=D&ust=1525355953867000&usg=AFQjCNFmqtc6vhwmaPMKqu8lVKXTvhDROg>

Get a clear understanding of the industry, the trends, and where your client falls within the market.

Examples of assessments your team might find helpful are:

- Current process analysis
- SWOT analysis
- Market/industry analysis
- Process design
- Content audit
- Process diagramming (BPMN diagram)
- Gap analysis

To gain further insights and data, several approaches can be used such as:

- Stakeholder interviews with management
- Process user interviews
- Questionnaires or surveys
- Onsite visits and ethnographic observations
- Documentation reviews
- User scenarios (stories about how various users navigate through the process)
- Business requirements checklist with key stakeholders
- Technical requirements checklist

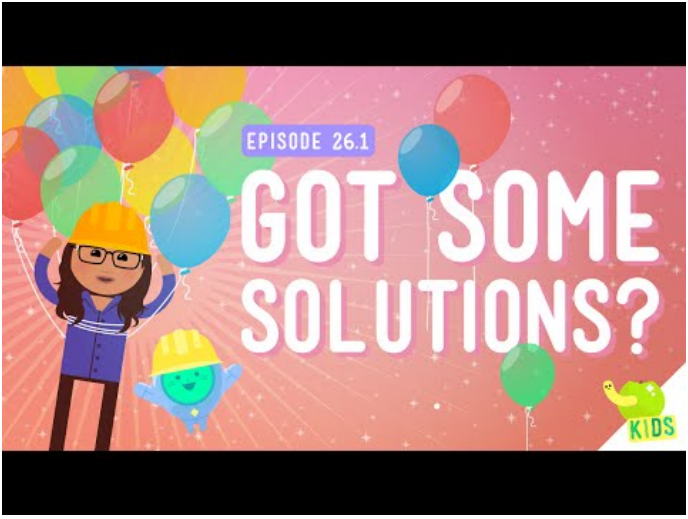
Leverage the relationship you've built with your client and know that at this stage, you'll have loads of interaction with them. It's important to, as early as possible, determine the individuals you'll need information from, the people you'll need to interview, the types of data you'll need in order to do a proper analysis. Essentially, you'll need to have a clear understanding almost right away of the what (types of information) and the who (the people who can get you that information).

During the Analysis phase, it's critical to keep focused and deep-dive into the problem and keep strong boundaries to stay within scope during the eight month course. Don't be surprised or intimidated if you have to go back to the client on several occasions to truly understand their organization and business problems.

It's important to be thorough with your analysis since it is the foundation to the solution, but don't get bogged down in analysis paralysis. Pick the right areas to explore and be cautious of your client's time (typically a consulting project is an addition to their day-to-day activities). Determine what data is relevant and what isn't. Keep the client informed (see [Chapters 15-17](#) for ways to do this) of your progress and your general findings, this will build that relationship and trust, and better prepare you and them for the solution and presentation discussions.

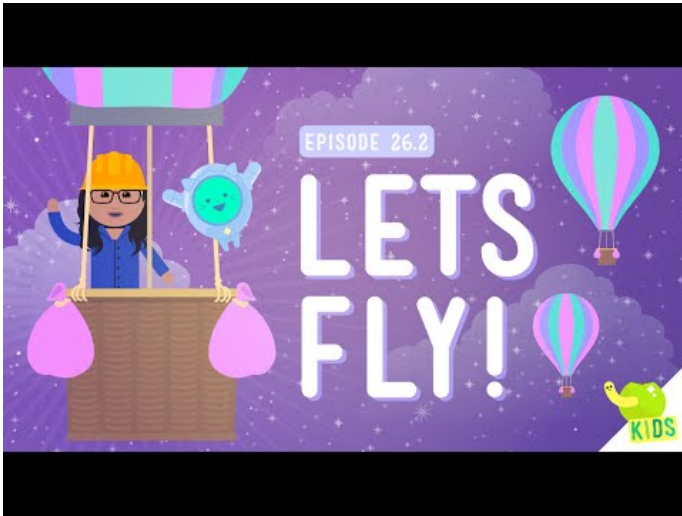
9.

## Chapter 9: Solution Phase



The image is a YouTube video thumbnail. It features a pink background with white stars and radiating lines. On the left, a girl with long dark hair, wearing a blue jacket and a yellow hard hat, is holding several colorful balloons (red, yellow, green, blue). Next to her is a small, blue, robot-like character with a yellow hard hat. The text 'EPISODE 26.1' is in a small purple box. The main title 'GOT SOME SOLUTIONS?' is in large, white, bold letters. In the bottom right corner, there is a small green logo with the word 'KIDS'.

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## WHAT Solutioning means

Most people love the Solutioning phase. In fact, up to this point, many students are itching to find a solution that causes the client to do a series of fist pumps. In this phase, your team will shortlist a small handful of solutions that answers the problem you identified in the Definition phase while meeting the requirements outlined in the Analysis phase.

## **WHEN Solutioning Happens**

An appropriate solution cannot be found until 1) you understand the business problem and 2) the client needs and future state desires have been fleshed out. While the Solutioning phase can only commence once the Definition and Analysis phases are done, it's worthwhile to know that phases 2-4 of the IT consulting process can happen before the first phase. For example, if you're trying to win some business, part of you preparing a proposal will entail you outlining a perceived problem, doing appropriate research, and coming up with a hypothetical and high-level solution.

## **WHO Solutioning Involves**

Your amazing team and as many vendors that you can get hold of.

## **WHY The Solutioning Phase Is Important**

This answer is quite obvious, but for those of you who are tickled by endless information, the Solutioning phase is important because it gives you, as a consulting trainee, an opportunity to provide an answer to a real business problem. Not to mention, it possibly helps to resolve a major pain that your client has had to deal with for some time. Ideally, the solution

you come up with in this phase will bring your client business value.

## **HOW to Navigate Through Solutioning**

While wrapping up the previous phase, Analysis, you probably started to see trends and indicators of how improvements could be made. Now during the Solutioning phase, the main objective is to determine suitable solutions and find vendors that have a solution that meets the predefined requirements. This is a critical area for consultants to excel in, since providing answers to business questions and challenges is the reason they are hired.

This phase requires innovative thinking and creativity (even creative problem solving) to chalk up solutions that solve some or most aspects of the problem area being investigated. The goal is to determine a recommended solution for the client and find a vendor that can make it happen. If your team is in the product stream, rather than working with vendors who have the solution, you'll be coming up with your own solutions and presenting them in the form of wireframes and prototypes.

Once possible solutions are drawn out, your team will need to evaluate them, indicate the recommended approach, and document why the other options were rejected. Based on your team's chosen approach to improve the business process, you can start to find an actual solution by first searching online

for companies that offer a product or alternative that can be leveraged by your client.

To begin, prepare a Request for Proposal or Request for Information RFP/RFI (see [Chapter 20](#) for examples) and distribute it to vendors that offer the solution you are looking for. Since there is no guarantee of receiving a response for every RFP/RFI sent, it is important to be professional and include the required information that the vendor requires. To assist with professionalism, you may want to create a group email address to use for exchanging communications with the vendor (can be Gmail, Ryerson, or any other email provider).

There are a few other things to consider for better RFP/RFI results. Some vendors will have their own template for an RFP. Find out up front when you get in touch with them. Also, to increase your chances of getting a response, be sure to ask your client if you can include their name and logo in the RFP. If they say ‘no’ that’s okay. You can, alternatively, provide an indirect description of the company – their size, what geographical markets they serve, industry and what they do (ie. a private, medium-sized medical provider that specializes in sports medicine services).

When you get your first vendor response, celebrate! Honestly, getting vendor responses is one of the biggest challenges Capstone students have when executing the project. If you don’t hear back at first, be persistent. After sending the first email, if you haven’t heard back within 2 business days, follow-up with another email and then a phone call after that. In all of your communications with vendors, make sure you remain

professional at all times. The moment a vendor perceives that they're interacting with someone who isn't serious about doing business with them, they'll avoid you like the plague.

Once you have received replies and completed RFPs from several vendors, conduct the evaluation process as a group to review all options. To help determine which vendor you should recommend to client to approach for the implementation, leverage the following assessments:

- Requirements analysis
- Cost benefit analysis
- Risk assessment

Based on the evaluation, choose your preferred vendor but don't stop there. Just as before, it is important to summarize the outcomes and clearly conclude why you didn't choose other vendors for their solutions.

Take all the analysis that was done and summarize it in a way that can be easily understood and managed. While the client is aware of the analysis you are doing, be wise in how you present the solution to them. You may encounter some hesitation or resistance to the findings. Document clear and concise supporting reasons for the solution to be communicated during the presentation and be prepared for some push back. In fact, you'll do well to anticipate what their possible reservations might be and find ways to counter those uncertainties.



10.

## **Chapter 10: Presentation Phase**



## WHAT Presentation means

You've put tape around that problem. You've worked tirelessly at researching. You've reached that Frankenstein moment when you finally found those potential solutions. Now, it's time to show this bad boy off. The Presentation phase is your proud moment to showcase all of your hard and (no doubt) amazing work to the main client stakeholders on your project.

## **WHEN Presentation Happens**

Have you found the perfect solution for your client's business problem? If the answer is 'yes' you probably can't even contain your excitement and you know it's time. The presentation typically happens at the end of the second Capstone term and there will be anywhere from one to a number of presentations, depending on how many separate audiences you have.

## **WHO Presentation Involves**

This isn't the chance for anyone to shy away. It's your shining moment to show off what you're most proud of, so start practicing early to hone in on your passion for what you've invested in with your everything for the past 8 months.

Every member on your team should play a role in presenting key takeaways and important points to your client and to your professor. Bonus if you can present to both at once. On the client side, you'll most likely have the project sponsor, decision makers, and anyone else who's excited about your project at your presentation.

## **WHY The Presentation Phase Is Important**

The Presentation phase is your opportunity to communicate the

juiciest of project details to those who need to know. Sure, your client can very well read the executive summary in the report, but that certainly isn't as entertaining as watching a team of people breathe life into those words. It's also a better way to get client approval for the project to continue on. Getting buy in from your client is a definite mark of success. It's a way of telling you, "We heard you. We like it! Let's make it happen!"

## **HOW to Navigate Through Presentation**

The presentation phase is when you share the analysis, findings, and solution to the stakeholders at your client company. It is important to be prepared to share what you have learned and be ready to answer any questions that the presentation may trigger from the client.

As you approach the big presentation day, there are a few things you should consider so that you're ready, set, go.

1. Before presenting to a large number of stakeholders, it is recommended that you meet with the primary stakeholder for initial feedback first. By providing a 'preview' to the main stakeholder of the solution and the content you plan to present, you both will be in a more confident place when presentation day arrives. You will know that you are aligned and have the support of your primary stakeholder, and they are already privy and reassured by what will be shared with the rest of the stakeholders. It's also possible that the stakeholder

will make suggestions on how you can improve the way the proposed solution will be received by the larger group.

2. Be prepared to speak at length about why other potential solutions were NOT chosen. As much as its logical to focus on why the chosen solution is being recommended, buy-in from stakeholders will come as a result of understanding why other ideas are not suitable. The larger group may be coming in with preconceived solutions or expectations of what the right direction may be. By being able to communicate the lesser benefits of other solutions, the stakeholders will be better positioned to provide buy-in.
3. For the presentation, engage with the audience by using a well designed slide deck, making eye contact, speaking loudly and clearly, exuding energy, asking meaningful questions, etc. This will allow them to see the commitment you have made to this project and how much you really care about understanding their needs and the landscape around them. In addition to presenting the analysis and solutions, also give insights into the implementation plan. Consider using the [BOPPPS framework](#) to help you determine the flow of your presentation.
4. Show respect for everyone's time. By having an agenda slide at the beginning of your presentation and some sort of visual progress indicator shown throughout, you're allowing the audience to form a mental map of your presentation and avoid the common distraction of wondering when the presentation is going to end. It's also very important to stick within the time limits that have been established for your presentation.

If you've agreed to a 15 minute presentation and a 5 minute Q&A session, no amount of effort or speed talking will do you any good if your presentation deck is 30 slides. No, not even the superhero Flash could accomplish this feat. As the famous saying goes, "know your limit and stay within it."

5. Get ready for questions. In fact, you'll do yourself a great favour by anticipating the questions you may get asked and having answers ready for them. This is also an opportunity for the quieter members on the team to weigh in on the 'conversation'.
6. Be open to feedback and make sure you're ready to document it while it's coming at you. You'll need this feedback to make any necessary revisions prior to finalizing your report. If you don't make the effort to get prepared for this, the jitters might get the better of you during the presentation and it'll be difficult to remember all of the feedback and questions you had received. Be diligent to review the feedback gathered before making the report revisions. Use the knowledge and understanding that you have gained over the course of the project to determine which feedback warrants revisions. Determine the best approach to modify the findings in your report, to make the solution better, and to validate the final offering/idea.

11.

## Chapter 11: Delivery Phase



## Special delivery

### **WHAT Delivery means**

Delivery is a series of tasks to formally close out your consulting work. It is here that you pass on the torch to those who will actually be executing your big idea and making it a reality.

## **WHEN Delivery Happens**

The Delivery phase commences when there is a final solution proposal that the client is ready to forge ahead with.

## **WHO Delivery Involves**

As a consultant, your role in this phase is quite small; really just the tip of the iceberg. Your team will be involved in the very early stages of the Delivery phase and then designers, developers, architects, and vendors alike, will carry on with the remainder of the project until the very end. Key client stakeholders will also be involved to sign off on your final deliverables as you wrap things up.

## **WHY The Delivery Phase Is Important**

This phase is important because it gives the awaiting teams/stakeholders the formal green light to begin their work on the project. It also helps to bring closure to your team and your portion of the project. The Delivery phase allows your team to tie up and loose ends and be able to walk away from the project feeling like you've fulfilled what was expected of you.

## HOW to Navigate Through Delivery

Now that the presentation is done and the appropriate revisions have been incorporated into the final report, the Delivery phase brings all the pieces together. This phase is where you submit the final report to the client as your last deliverable and to your professor for grading.

The report, as outlined by the ‘[Guidelines for the Group Project](#)’, should detail the company and industry analysis, the findings, as well as the solution (and alternatives) being proposed. While the implementation of the solution is not part of the project, the implementation plan is expected to be included in the report. Once the report has been shared with the client, expect some additional discussions and, ultimately, a sign off of the project/report.

In some cases, the client may choose to keep in contact and request your assistance if they proceed to implementation of the solution. While this isn’t a requirement for the Capstone project, it is a great opportunity to build relationships with professionals and companies, which may lead to future employment.

At the end of the project, after the report has been submitted and in the midst of celebration, it’s important to take the time for close-out activities. This is the opportunity as a group to discuss the learnings from the project, as well as bring the relationship with your client to an end.

Gather with your group and key client contact(s) and do a project post-mortem activity. Through this session, the main objective should be to answer the following questions relating to the entire project lifespan:

- Were all goals achieved? Why/why not?
- What went well?
- What didn't go well?
- What can we conclude by comparing progress against the project scope?

As the project wraps up, this activity will level-set all aspects of the relationship and suggest areas of improvement and growth for all parties. In addition, conclude conversations with your client by ensuring they have the tools and contacts they need if they choose to proceed with the proposed solution.

As Smartsheet outlines, the client will also have a few things to do in order to effectively close out this portion of the project. “Once the project is complete, PMs still have a few tasks to complete. They will need to create a project punchlist of things that didn't get accomplished during the project and work with remaining team members to complete them. They'll also need to perform a final project budget and prepare a final project report. Finally, they will collect all project documents and deliverables and store them in a single place.”<sup>1</sup>

If there is interest, you can explore other opportunities with the

1. Esposito, E. (2015, October 5). Demystifying the 5 Phases of Project Management. Retrieved from <https://www.smartsheet.com/blog/demystifying-5-phases-project-management>

client and continue your working relationship. Keep in mind that as an unpaid student consultant who's about to graduate, you'll want to ensure that the proper transition into a professional working relationship takes place. By this point, you will have earned your stripes, so there should be no need (unless it's something you really want to do) to continue to volunteer yourself to your client.

## **PART III**

# **PART 3 - The Life Of The Party: Everything You Need To Know About Managing Your Client**



PART 3

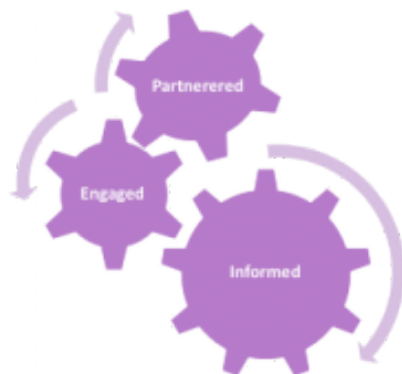
# THE LIFE OF THE PARTY

Everything You Need To Know About  
Managing Your Client

12.

## Chapter 12: L[in]ked

As if the task of finding a client wasn't hard enough, there is no promise that working with your secured client will be smooth sailing either. Working with real clients requires a delicate balance of courage, finesse, humility, and knowledge.



You might not believe it, but managing a relationship with your client is one of the most important things within the realm of your Capstone project. The goal should be to achieve positive

results with every client interaction you have by keeping clients informed, engaged and partnered. Remember, no client, no project!

To get started, here are some client do's and don'ts to consider:

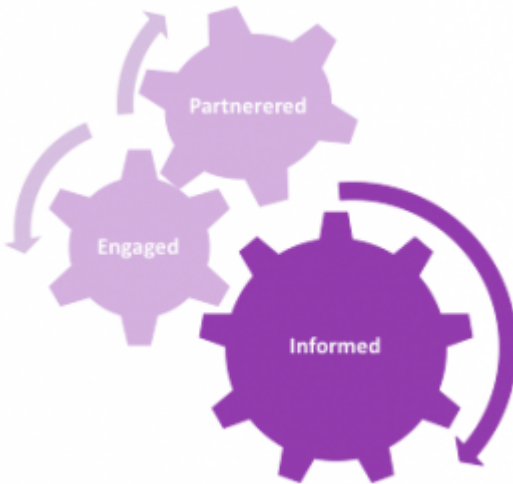
| DO: | DON'T |
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|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Have the constant mindset of building a lasting relationship</li> <li>• Listen first. Focus on being a good listener</li> <li>• Frequently ask yourself, “Are we adding value?” and “Are we helping to enable the client’s success?”</li> <li>• Always stay cool, calm, and patient</li> <li>• Own both your victories and your fails</li> <li>• Be friendly and approachable</li> <li>• Be on time, in fact, be early to all meetings</li> <li>• Get regular feedback (preemptive and from the client) and take time to address it</li> <li>• Make the effort to go above and beyond</li> <li>• Communicate clearly and directly. Leave no room for confusion or grey areas.</li> </ul> | <ul style="list-style-type: none"> <li>• Overcommit yourself. Don’t say ‘yes’ to everything</li> <li>• Pretend to have all the answers</li> <li>• Lie or fake information</li> <li>• Make the client wait on you</li> <li>• Make promises you can’t keep</li> <li>• Be rude or inappropriate towards or in front of your client</li> <li>• Rely only on emails. Phone and in-person meetings can often be quicker and more information rich connections</li> <li>• Be inaccessible</li> <li>• Try to cover mistakes. Own them.</li> <li>• Avoid speaking about issues</li> <li>• Over complicate things</li> <li>• Leave bad news until the last minute</li> <li>• Get involved in politics (office or otherwise)</li> </ul> |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

While the next few chapters in this section are dedicated to helping you best manage your client relationship, it doesn't hurt to be over prepared (and humoured). See "How To Identify And Deal With Different Types Of Clients" in [Part 5](#) for a fun list of different types of clients and how you can best manage those types of relationships.

13.

## Chapter 13: Keep Your Client Informed



Though keeping your client informed, engaged, and partnered all work hand in hand, the biggest driver to a good client relationship is keeping the stakeholders you work with in the know.

Metaphorically speaking (and based on the awesome accompanying diagram), it's what keeps the other cogs turning.

Yet over the years, outside observers such as clients, alum, and professors alike find students often coming up against the same challenges:

- Not knowing how to balance course and client expectations
- Unwillingly getting involved in the implementation phase
- No/poorly written contract that vaguely describes boundaries and expectations
- No clear follow ups or action items
- Treating clients as the only source of information (works two ways)
- Uncertainty around how, when, where, and with whom to communicate
- Not knowing how to respond or what to say
- Fear and procrastination over sharing bad news

More often than not, your client won't know what to expect, what kind of project they have to offer, what the business challenges are, and \*gasp\* that they even have a problem that needs solving. Yes, these situations can be nothing short of overwhelming and frustrating, but you've been 'hired' as the experts, so you'll need to proactively take the reins. Check out

Aaron Irizarry's vlog below starting at 2:37. Though he speaks mainly to an audience of designers, the same advice applies to anyone working with clients – getting the client to trust and rely on you means that you're responsible for building positive bridges over informational gaps.



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<https://pressbooks.library.ryerson.ca/itmcapstonesurvivalguide/?p=143>

What are tactical methods you can employ to strengthen your relationship with your client by keeping them informed? Keep reading to find out.

## Setting up Expectations

Much like the need to have an [internal baseline](#) for your team, surely you can see by now that formally establishing expectations with your client is incredibly important too.

As you navigate the very preliminary stages of your project,

you'll find that clients may ask the following questions as both teams sort out expectations:

1. How do you expect us to support your project?
2. We have some project ideas. What is your take on them?
3. How many hours do we need to allocate each week for this project?
4. Do you work on our premise?
5. Can you work on the following deliverables that aren't part of your project?

### Determining Roles

As you would have previously determined, there should be one main contact person on your team to lead up client discussions. You'll need to also document which roles your stakeholders will play on this project. Typical roles that clients fill are seen next. Please note that sometimes a person can take up more than one role. For information on these roles and the responsibilities of each, [Part 5](#).

- Project Sponsor
- Project Champion
- Project Manager/Team Lead
- Team Members

- Those who complete project tasks. Can include subject matter experts, functional leads, analysts, product owners, etc.

## Deliverables and Time Expectations

There are a series of deliverables your team will need to complete over the course of the Capstone project. However, don't treat them like a school assignments where you're heads down working toward a mid-term and end-term deliverable. Business is collaborative. Bounce ideas off your client, check in to see if you're on the right track, have collaborative discussions, stay in touch even if it's just to say, "we're still working on it". If the client doesn't hear from you in a while, they may interpret that as lack of progress/commitment.

That doesn't mean that you and the client are figuring out what the deliverables are and when they should be delivered together. Don't forget, your team is leading this project, so it'll be your responsibility to call out what your outputs will be and when to expect them. See below for some help.



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<https://pressbooks.library.ryerson.ca/itmcapstonesurvivalguide/?p=143>

You may also find that around the time you and the client

discuss these deliverables in the early pre-project stages, they ask questions around time commitment. Whether you get asked or not the specific question, “How much time should I dedicate to this project”, you should give your client the heads up that they can expect to spend upwards of 5 hours each week on this project during term one weeks 1-4 and term two weeks 1-4, and anywhere from 2-5 each week in between.

## Communications

Let’s be honest, every client is different. That’s why it’s important to have an open and honest conversation at the beginning of the relationship to see what works best in terms of frequency and means of communication (conference call, in-person, email) and then revisit throughout the term to see what is/isn’t working and needs to be tweaked.

Freelancing for Dummies has excellent advice when thinking through client communications. Of their array of tips, most notable are:

- Ask your client when and how they prefer to receive updates (email, phone, in-person)
- Share key information, “where you stand, whether you’re on time, whether you’re experiencing any obstacles (and how you plan on overcoming them), and whether you need any of the client’s help
- Organize thoughts into a brief report and send to the client before the meeting

- Make sure to stick to the delivery dates you've agreed upon
- Anticipate which questions the client will be asking you and prepare your responses in advance

When managing communications with your client, there are two noteworthy things to remember:

1. Keep it in context – Choose the right communication for the right purpose. For example, face-to-face when it will benefit the discussion, conference call when you need to discuss but in-person isn't necessary, email for quick updates, etc. When deciding which channels to explore, make use of the same questions outlined in [Chapter 3: Securing a Client](#).
2. Make it efficient – Wherever possible, send materials/questions in advance so the client has time to prepare and to make the meeting as effective and efficient as possible

Be sure to document your communications plan using any of the templates found in [Part 5](#) and include it in the contract you share with the client.

### Statement of Success

So, you've been through this process already (group formation) and are probably wondering why you need another statement of success. Well, just like your other statement ensures that you and

your teammates are all on the same page, having a client-facing statement of success also makes certain that you and your client are journeying together in the same direction.

This statement should be a collaboration between your team and key client stakeholders, however, your team is responsible for leading the activity and ensuring that the statement is a thorough, realistic, and measurable reflection of what success looks like when it's been met. Start with the S.M.A.R.T template found in [Part 5](#) and use it as a launchpad to developing a 1-2 sentences statement of success.

## Meetings

Of all the meetings you'll be having with your client, checkpoint meetings are probably one of the most important. Your team is advised to seriously consider running weekly checkpoint meetings with your client to chat about or demo progress made so far, request information, raise questions, identify challenges and talk about how they can be resolved, and to run through action items. An agenda for these meetings should be prepared and shared with the client in advance.

Other types of meetings you can expect to have with stakeholders are:

- Kick off – project and people intros, getting to know each other
- Info gathering – tours, stakeholder interviews, current

process discussions, etc. More discussed in ‘Getting Information’ seen later in this chapter

- Deliverable review – getting client feedback on deliverables before they’re submitted. Can also be working sessions
- Final presentation

## Contracts

The culmination of all these expectations should be documented in a contract. A contract is a commonly used business document that helps to paint a clear picture of what both sides of the table are expecting to take place during and after the project. Contracts are also used as a guiding point throughout the project, helping the team to reel it in when things get messy or confusing. Types of contracts you can expect to use:

- [Statement of work \(SoW\)/Project Charter](#)
- [Non-disclosure agreement \(NDA\)](#)

When reviewing these contracts with your client, it’s not unusual to have a bit of back and forth as both teams try to refine them. Some clients might even get their legal teams involved, but it’s no cause for alarm. When your stakeholders do this, they’re just trying to ensure that everything has been covered and that their business isn’t unnecessarily being put at risk.

Also, be mindful that companies will be sharing quite a bit of

private information with you. Even if your client doesn't get you to sign a confidentiality agreement, part of your professional responsibility is to protect the client and data you've been entrusted with. This means that details of your project (even your client's company name) shouldn't be shared with anyone outside of your core project team consisting of client stakeholders, group members, your professor, and the BTM department. Even sharing project details with a different client department than the one you're working for is a no no.



## Getting Information

While a lot of emphasis has been put on keeping your client informed, keeping the client involved and engaged also hinges on you getting information as well. Your team will need to gather the appropriate information at the right times in order to make wise and informed decisions (see the cards below). You want, after all, the final solution you offer to be the best possible.

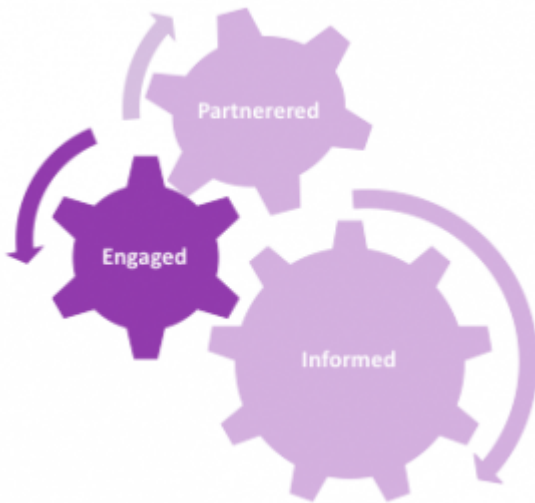


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14.

## Chapter 14: Keep Your Client Engaged



What do you do if you've sent several emails and haven't heard back from your client? How do you overcome that fear of being a nuisance

or pest when considering emailing just one more time? Or what about when your main stakeholders get pulled away onto bigger and more pressing company projects? What if your client goes through the dreaded organizational change or \*gasp\* asks to withdraw from your project?

Perhaps you're thinking, "We've got this, it won't happen to us!" or maybe you look like a deer in the headlights right now. Either way, this chapter will help you take a proactive approach to mitigating and hopefully eliminating these challenges altogether.

Just in case you'd still like to get equipped to deal with these sort of issues if they do come about, we have you covered in [Chapter 16](#). No need to cue the hold music.



## Establish Formal Expectations

Being proactive means that you need to be active, as in doing some kind of work before hand to prevent yourself from falling into traps or sinkholes, in some cases. Start your client relationship on solid ground. Remember the contract, communications schedule, roles, etc. that we just discussed? These things were mentioned first because they're essential in laying the groundwork for good client engagement. They're kind of like setting up the ground rules to guide your relationship with the client. Notice we've used the word 'ground' a lot? That's

because these activities, much like tilling soil, when done right will help your client relationship ‘plant’ grow.

Start by ensuring that expectations are set upfront in terms of what you’ll deliver, how you’ll communicate, key milestone dates, what level and kind of engagement is needed, and be sure to include agreed upon response rate times somewhere. When chatting about deliverable schedules with your client, it’ll be worthwhile to outline what kind of information or help you might possibly need for those deliverables. And, when actually putting out requests to your client, give them enough time to get back to you. Sending a request via email at 8:43am on Friday and expecting to receive the goods by 5pm the same day is just not cool.



## Communicate and Collaborate

The essence of CRM is fortifying client satisfaction, but the work should be 50/50. It's a relationship of give and take, which is why communication is also extremely important. Working through the SoW or other project contracts, they can be intimidating, but treat them as discussions. In fact, it was suggested earlier that the creation of these documents should be done in working sessions between both sides as a collaboration. If, for example, a 24 hour response turnaround time is what you're expecting, this should be discussed, agreed upon, and documented in the contract with your client.

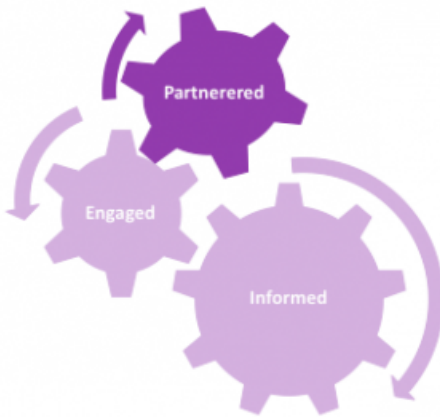
Also, active communication is the best way to manage expectations. How can you ensure active communication? Simple – a continuous feedback loop. Emails and especially your weekly checkpoint meetings with the client are ripe opportunities to offer direct (ex- “we really struggled getting access to you last week”) or indirect (ex – “Since Mina didn't send us the financial statements, we were unable to complete ...”) feedback. You might also want to explore more formal/structured feedback methods like sending your client a survey at the end of the first and second semesters. Be mindful though – surveys should be short, easy to fill out, and should only ask opinions on things that you're able and willing to change. See [Part 5](#) for survey samples and templates.

## Get Hyped

Lastly, remember that enthusiasm is contagious. Generally, if the client believes that you have a clear understanding of their challenges, that you're committed to helping to address them and add value, and you're making effective use of their time, then they'll reciprocate.

15.

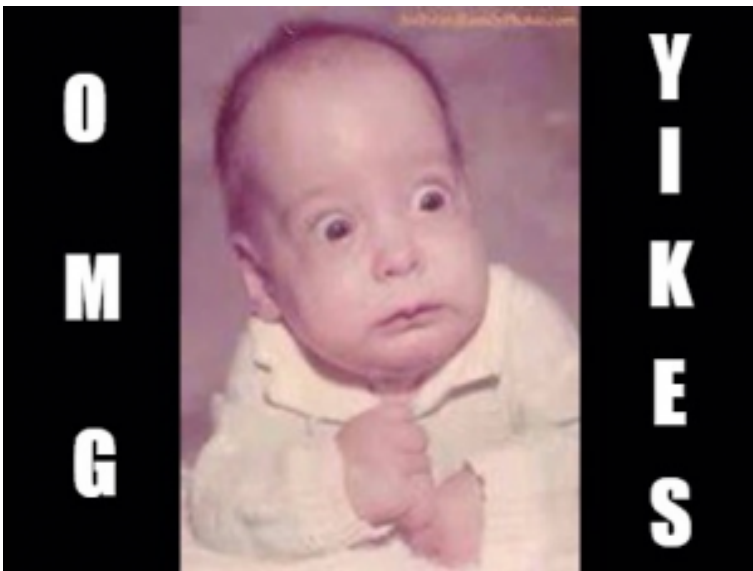
## Chapter 15: Keep Your Client Partnered



Many students who have come before you have had great difficulty navigating through situations that involve clients with very strong or different opinions. It becomes even trickier when there is a high degree of politics or infighting on the client side. And when the slightest bit of conflict between student teams and clients starts

to simmer, students tend to just awkwardly freeze in their tracks, hoping that by a miracle, they're suddenly invisible.

Like that time your client says to you, "I know we're already 5 months into this billing automation project, but the President has heard that the Marketing department has been up to some really great things and she feels that's where the money's at. Can you read through the social media analytics report tomorrow?".



Fortunately, if you've read through Chapters 13 and 14, much of the same advice applies here too in keeping your client partnered with you. Though there are just a few more things to consider when navigating through your business relationship.

## Scope Creep

As with keeping the client engaged, being partnered comes down to keeping communication channels open and ensuring you start with solid guidelines and boundaries. If there's the slightest hint of scope creep, you can always refer back to your project contract to help redirect the project back on course. That's why it's important to ask yourself if there are any grey areas or anything open for interpretation when going through the contract creation process with your client. You want to have clear perimeters around your project so don't be afraid to ask questions throughout your project.

### ACTIVITY

Even though everyone has the same instructions and the same starting materials, oftentimes each person yields a different result due to interpretations and assumptions. As an example, round up your team to do the following activity. Each of you will need a letter size sheet of paper.



AND LISTEN TO MY  
INSTRUCTIONS

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<https://pressbooks.library.ryerson.ca/itmcapstonesurvivalguide/?p=147>

A similar activity with written instructions [can be found here](#).

## Embracing Change and Ambiguity

That being said, it's good business for you to also remain flexible. If a reasonable adjustment is needed to best meet business objectives and provided that it still allows you to meet your objectives, then be open to making changes where there are business needs. Businesses are always changing. As long as the

change to scope provides value to the client and won't throw your team off course, don't be shy to fill out a change request (CR) form and take on the changes (see Part 5 for templates and samples). If it's going to completely change your project and compromise what you promised to deliver, then point the client back to your project contract.

#### SIDE NOTE

##### ***A story about change:***

The Capstone project was focused on the security training process for an insurance company. It was the understanding of the team that they would identify a training solution and write user documentation. However, they did not clearly define what was entailed in their project work. When the winter semester came along, the Capstone team were taken aback when they were told that they were also expected to implement the solution as well as supply documentation for user, system admin, and security configuration. Due to the time constraints, the team could not complete all of the documentation, and the client sternly pointed out that the team breached the contract! Had the team clearly defined the project deliverables, they would have avoided being in a sticky situation and the embarrassment of receiving criticism from the client.

## SIDE NOTE

***A story about ambiguity:***

A group of six was working for a client who was very eager to work on the Capstone project. The client, in his excitement, assigned six employees to work with the Capstone team and instructed them to divide the group into three subgroups, each of which focused on improving a different part of the system they were using including HelpDesk, Digital Media, and Infrastructure. The students were excited and confused at the same time; they weren't really sure of the direction they were heading towards. Yet, every time the Capstone team met with their instructor, the update would simply be, "Everything's going great!".

It wasn't until the instructor received the team's deliverables that gap was discovered. There was a great lack in definition of the process the team needed to improve on and, relenting, the group bashfully admitted that they did not exactly know what the process of the focus was in their Capstone project. In lifesaver mode, the instructor had to reach out to the client, and only after several rounds of discussion were both sides finally able to reach an agreement. However, by that time, it was almost November, and the due date for the interim report was merely three weeks away.

## Dealing with Conflict

**Conflict** \ˈkän- flikt \ *noun* – Competitive or opposing action of incompatibles : mental struggle resulting from incompatible or opposing needs, drives, wishes, or external or internal demands.<sup>1</sup>

When conflict does arise with your client, don't be shy or argumentative. This isn't about fight or flight. There's a professional way to deal with disagreements. First, remember that your client is human too. Give others the benefit of the doubt and believe that they are acting with the best of intentions. If you notice that something is off or your client seems upset, talk it through with honesty. Don't let the situation stew because you're afraid to come up against any sort of differences. Take the lead on resolving issues and misunderstandings. Doing this in a timely manner will not only win you favour with the client, but it'll also improve your relationship. Believe it or not, research has shown that those, "who address and resolve their conflicts are significantly more satisfied with their relationships than [partners] who do not".<sup>2</sup>

When it comes to being partnered, don't overlook your team either. Clients can sense when team dynamics are off. Is one of your teammates not pulling their weight? Did someone on your team completely talk all over you during a client meeting? Have

1. Conflict. (n.d.). Retrieved May 4, 2018, from <https://www.merriam-webster.com/dictionary/conflict>

2. Owens, M. (2015, October 29). The Art of Confrontation: How Conflict Can Improve a Feeler's Relationships. Retrieved from <https://www.truity.com/blog/art-confrontation-how-conflict-can-improve-feeler%E2%80%99s-relationships>

you had a blowout with a group member on the information they included in their written part? Your team members needs to be partnered with each other first before you can expect the client to dap fists with you.

## Advice from an Expert

The advise doesn't stop there. Tamara Doerksen, Director of ITS at KPMG and Founder/CEO of Lonny's Smile Foundation, with her wealth of experience offers a few more tips:

1. Have a solid foundation. Project contract that outlines what communications and expectations are and how you'll engage with each other
2. Ask for feedback. You will be able to course correct along the way.
3. It's a 50/50 relationship. Partnership means an equal relationship. Present yourself in a way that the client looks at you like a professional, not a student.
4. Name it and claim it. Check out [this podcast](#) on saving your client relationship.
5. Have fun with your project. The Capstone project is the crowning glory of your undergraduate education!



PART IV

**PART 4 - It's All About  
That Bass, No 'Trouble':  
Problem Solving  
Proactively**



PART 4

# IT'S ALL ABOUT THE BASS, NO 'TROUBLE'

Problem Solving Proactively

## 16.

# Chapter 16: Resolving Client Issues

Experiencing hiccups with a client can be a nerve-wracking experience for even those who have nerves of steel. Most times, some sort of conflict can be healthy for your relationship though, as discussed in [Chapter 15](#). How you respond to these issues can really make or break things (hopefully not literally). Keep reading on to discover how to navigate tumultuous waters with your client.



## What to Watch out For

*\*cue cheesy infomercial\** Is your client cutting you sideways glances? Throwing shade at random moments? Giving you the cold shoulder? Stakeholders not returning your calls? Does it feel like someone's broken up with you?

You have a case of the client blues. It can happen to the best of us for a multitude of reasons, including mistakes you've made to things completely outside of your control. Though, nothing's worse than the client falling to pieces because things have gone awry and you're oblivious to it all.



Do a gut check. If any client interactions have made you feel uncomfortable, or you've left a discussion wondering if everything's okay, or even if something tiny seems off, don't ignore those warning signs. Sure, it's much easier to pretend that nothing is wrong, but it'll be much more beneficial for your team and client if it gets addressed and soon.

## Responding to the Issue

Freelancing for Dummies encourages freelancers/consultants to do whatever is necessary to bring your client relationship back on the mend and to get client satisfaction back to a good spot. This is especially true for a client that you'd like to keep, and

equally as true for a client you'd desperately like to 'fire'. Ending a client relationship on a sour note, no matter the intentions or reasons, can cause a reciprocal bad opinion of you and your group mates and word gets around quickly!

Whether the issue arose because of a mistake your team made or a client faux pas, deal with the problem straightaway once you discover it. Problems typically don't resolve themselves and it'll be your responsibility as professional consultants to address the issues head-on and make attempts to smooth things over.

Before you take things up with your client, have a general understanding of what caused the issue. If it's something that requires some digging, start by discussing it amongst your team to come up with possible triggers. You can also try connecting with other stakeholders (ex- secondary contact) who aren't part of the issue but may know what caused it. It might also just require that you speak directly with the 'culprit' to get some answers.

Then, request a meeting with your client and tell them you've noticed things have been a bit off and your team hopes to talk it through with them in person. It takes a lot of guts to request this sort of meeting and knowing that it'll be done face-to-face is especially scary since you can't hide behind a screen, but it'll be so worth it. Be flexible, but insistent. You may get initial pushback with a barrage of excuses like, "Oh, my calendar's full" or "I didn't even know there was an issue", but sweeping the problem under the carpet won't do anyone any favours. If you're met with excuses to not meet or discuss, let your client know that it'll be really important to you to chat and that your

team is willing swing by whenever there's a small pocket of time (over the next week) to work things out.

When the discussion does finally happen, it should give your client just as much opportunity to share thoughts as it does for your team. This meeting isn't just about you. It's about both sides coming to an amicable solution so that you can move forward. This meeting is not a platform for your team to round off a bunch of issues you're having. It should be a discussion with things like, "We've noticed that you do xyz when we try to abc" and "We think a better way to navigate through things like that might be pqr." In other words, don't just bring the issues, bring up possible solutions as well. If it's something you or a teammate has done wrong, own it, apologize, and explain how things will be done better next time.

Freelancing for Dummies<sup>1</sup> has an excellent 6-point list for turning client complaints into compliments:

1. Don't be defensive. Listen. Keep your focus on the client's need
2. Apologize. [Do the very Canadian thing of] apologizing even if you didn't do anything wrong. Actually say the words, "We're sorry for any inconvenience this has caused you."
3. Look for solutions. Collaborate with the client on finding suitable solutions.
4. Take action right away. The sooner the issue is

1. Drake, S. M., Recorded Books, & LLC. (2013). *Managing Client Relationships*. In *Freelancing for Dummies* (pp. 205-206). Hoboken, NJ: John Wiley & Sons.

resolved, the sooner that awkward tension can be avoided and the sooner everyone can move forward.

5. Follow up. Ask the client if they are happy with the solution and how things have been going.
6. Send a note of appreciation. Let your client know how much you appreciate their business.

## Other Things to Consider

What about when your client is suggesting something or pushing you in a direction that isn't quite right? How do you professionally tell your client they're wrong? Before you lash out with a resounding 'no', take some time to consider if the client is actually wrong. Just because you might not agree with the client's suggestion, doesn't necessarily mean that what's being proposed isn't right for the project.



Start by determining what the reason or business case for the request is. This may help to give you information that you weren't already aware of. Knowing the reason behind the ask will also give you better context and will hopefully allow you to be better positioned to offer beneficial alternative solutions for the project's end goal.

When it comes down to it, if the client is giving you a nonsensical request that makes you want to bang your head against the wall and should "why?" repeatedly, there is a right way to tell your client that they are wrong:

- **Understand the reason behind the request.**  
Blurting out, “It won’t work!” will get you nowhere fast. Everyone is entitled to their own opinions and telling someone that they’re flat out wrong is offensive. Instead, ask how they think the suggestion will benefit their business and always bring it back to the previously defined project key process indicators.
- **Suggest alternatives.** Your client wants to feel like they’re in control. When you shut down their suggestion, pride can get the better of them and they may feel they’ve lost control in a way. Offer a few alternatives that will benefit both your team and the client and ask your stakeholder to choose one. Giving your client the opportunity to choose will allow them to feel like they still have a say in how the project goes.
- **Don’t make rash decisions.** It might be tempting to do so especially when you feel you are under pressure. To make sure that whatever decision you are going to make won’t negatively affect your Capstone project, tell your client that you need to consult with your course instructor about the request and let them know when they can expect a response.
- **Don’t send a long email.** People are already inundated with emails as it is and when they receive a long (and probably heartfelt) one, it becomes a daunting, unapproachable task to respond. Talk things out in person or via messaging channels (ex- Slack, Campfire, etc.) to sort things out quickly.

- **Give honest, constructive feedback.**
- After you have consulted with your course instructor and group members, work internally to come up with the response that you all are confident in and comfortable with. Then convey that response to your client professionally. There's no sense skirting the issue or letting your client think that you're giving serious consideration to irrelevant or even detrimental requests. Let your client know why what they're asking for won't work and what the implications could be if their suggestion is implemented.
- **Back your advice up with evidence.** Who can argue with hard evidence? Showing your client the right analytics or research can help to change their mind.
- **Offer alternatives.** Your client wants to feel like they're in control. When you shut down their suggestion, pride can get the better of them and they may feel they've lost control in a way. Offer a few alternatives that will benefit both your team and the client and ask your stakeholder to choose one. Giving your client the opportunity to choose will allow them to feel like they still have a say in how the project goes.

## Some Examples

### Client Engagement Wanes

Quite a bit of time was spent in [Chapter 14](#) on the importance of maintaining client engagement. Yes indeed, you need to remain proactive about upkeeping client engagement, but what do you when, in spite of your best efforts, the client doesn't ... well ... seem to be that interested any more? There are a few things you can do:

**1) First, have a chat with the main stakeholder.** Don't delay any issues. If you feel the client has become non-responsive, indifferent, or dissatisfied, take action. You can connect with your client directly to follow the suggestions in this point, or if your team is feeling uneasy about it, loop in your instructor to get their assistance.

You don't want to be perceived as a pest, but if you haven't heard back within 2-3 days, then follow-up. If you're not getting enough traction, pick up the phone and say, "Just want to make sure you saw our last email. Is there a time we can chat about this?". Of course, you want to be courteous and professional, but let them know the risks/impacts of not getting a response by saying things like, "this is why I need to hear back from you by Friday."

What do you do if your client is constantly late or canceling last-minute? Have a conversation with the

stakeholder to talk about why the meetings are important. Ask if there is another channel that can be used and come up with something together. Also, explain to your client that your team is earnestly trying to meet their business objectives. Tell them that in order to do that effectively, you need their time and the opportunity to work together.

If your client is suddenly being unresponsive, meet with them. Determine if anything has changed and if it has, tell your client that you'd like to get back to that good place. If client isn't responsive and it's impacting your ability to deliver, lay out the risks and impacts in terms of not being able to complete your deliverables and how that will affect their business objectives. Then, have an open and honest conversation about how you might work differently together to get the traction that's needed. It may seem like a tough and uncomfortable conversation, but use this opportunity within the context of your school project to develop communication and negotiation skills that you'll need throughout your career.

**2) Consult with your instructor.** During this consultation you and the instructor can come up with a course of action for your team to pursue. There have been countless occasions when the client becoming more responsive once the instructor has gotten involved.

**3) Ask your instructor to take the lead.** If your team feels that the issue is far beyond your reach and you're in need of a life raft, you can always approach your instructor to ask them to have the necessary conversations with the client on your behalf. Your instructor is there to support and guide you, so it'll be important to notify them right when the problem occurs and keep them updated on your progress.

### Losing Your Client

Losing your client is probably the most unfortunate situation that can happen during your Capstone project. Your client can drop out of the race for a number of different reasons, including:

- Organizational problems (restructuring, role changes, etc.)
- Budget problems (departmental cuts, can no longer dedicate human resources to your project)
- Political problems (conflict of interest, priority shift due to company changes, etc.)
- Performance problems in very rare cases (not delivering to client's expectations, making a very costly error, etc.)
- Personal issues. Recently, one member dropped out of the course, and since he found the client, the client withdrew from the project.

When stuff like this happens, it's a disappointment for everyone involved and, understandably, a cause for crocodile tears. If it ever does happen, don't be discouraged – there's still hope. If you're ever faced with this situation, loop in your course instructor right away. Let that support person know what's happened with a concise summary. Next, come up with an action plan together. This action plan will most certainly involve you all meeting with the client to chat about the issues (or what brought you to this point) and possible solutions. If your client is still insistent on dropping out for whatever reason, your professor will be responsible for determining a final solution for your team to move forward.

During this process, it'll be important to keep in mind the following Do's and Don'ts as suggested by *Freelancing for Dummies*:

**DO**

- Accept responsibility for any mistakes you've made and apologize
- Let your client know that you've enjoyed working with them
- Ask how you can rectify the situation
- Ask for another opportunity to serve them
- Thank the client for the time and other resources they've invested so far

**DON'T**

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- Get defensive
- Try to prove your client wrong
- Bad mouth your client within or outside the company in any way
- Burn your bridges with them
- Feel entitled to any sort of compensation (even an apology)

## 17.

# Chapter 17: Resolving Group Issues

Even the best and most synergistic of teams can experience conflict at times. It happens to the best of us and it comes part and parcel of doing life together. It's a definite challenge when you're trying to navigate through unsavoury internal situations and even worse when you can't get together well enough that you're in shambles in front of your client. As you might have guessed, there are some tips here in this chapter to help you strut through these group challenges like nobody's business.

## Challenges and Responses

The University of Waterloo Student Success Office<sup>1</sup> (how great

1. Student Success Office, University of Waterloo. (2018). Working Effectively in

is that!) has come to save the day. They offer tips for a whole slew of sticky situations you might experience with your team:

| Challenge           | Description                                                                                                                                                                                        | Advice                                                                                                                                                                                                                                                                                                                                 |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scheduling problems | This can create roadblocks to getting started/continuing with projects. It is frustrating for students who feel that others aren't compromising and don't take their situation into consideration. | <ul style="list-style-type: none"> <li>• Try and be understanding of others' schedules and responsibilities which may be different from your own</li> <li>• Consider using virtual meeting spaces such as messenger chats, Skype, and email to communicate</li> <li>• Take turns picking the venue and time of the meeting.</li> </ul> |
| Group conflict      | Group conflict is natural and often necessary for effective projects. Sometimes though, it escalates and makes it even more difficult to focus.                                                    | <ul style="list-style-type: none"> <li>• Don't let personal feelings impact your work in the group. Focus on the task.</li> <li>• Try and find common ground between two ideas to reach reconciliation</li> <li>• Address conflicts directly and respectfully</li> </ul>                                                               |

|                            |                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                      |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Uneven contribution</p> | <p>Some group members don't contribute to the group project or aren't perceived to be contributing to the group.</p> <p>This creates tension in the group and is unfair to the group members</p> | <ul style="list-style-type: none"><li>• Set up clear guidelines and work expectations at the beginning of the group project</li><li>• Assign roles and responsibilities so that each person will be making an equal contribution</li><li>• Speak directly, but respectfully to the person who is not completing their work</li></ul> |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                        |                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                   |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Different expectations | <p>Some members strive for perfection, while others simply want to pass. Some begin projects in advance, while others procrastinate.</p> <p>This can create tension because the group is not working towards the same goal.</p> | <ul style="list-style-type: none"> <li>• Early communication is key to make sure everyone is focused on common goals</li> <li>• Keep goals realistic and understand that your actions affect others in the group</li> <li>• Make a timeline so that your group can stay on an agreed plan for getting the project done</li> </ul> |
| Getting stuck          | <p>At some point groups may get 'stuck' and hit a mental roadblock. This is discouraging and can lead to procrastination and avoidance.</p>                                                                                     | <ul style="list-style-type: none"> <li>• Reread project expectations and goals</li> <li>• Have a brainstorming session where ideas are discussed</li> <li>• Create a mind map to link common ideas and trains of thought</li> <li>• Seek help from your professor if you remain stuck</li> </ul>                                  |

|            |                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                      |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Groupthink | <p>‘Groupthink’ occurs when members of a group agree with other group members in order to avoid conflict. This stifles creativity and constructive evaluation of alternative ideas.</p> | <ul style="list-style-type: none"><li>• Thinking critically about ideas presented, offering and assessing alternatives, and embracing diverse opinions from group members</li><li>• Work through projects analytically using the groups’ combined knowledge and experience</li></ul> |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Students tend to feel embarrassed to share the group related challenges with their course instructor. Teams often feel they should be able to figure out problems on their own and that involving someone else will just amplify the problems. As well, nobody wants to be regarded as a ‘snitch’. Believe us, these are huge misperceptions.

The role of the course instructor is to bring all members together to the group project, and make sure that everyone is accountable and committed to the group work. As real as the Capstone project is, the project is still a course project. So unfortunately, some students take advantage of that and choose not to

contribute to the group work. This is completely unprofessional and disrespectful! However, students feel powerless because the project takes place in the university setting, not in a workplace. The only way in these cases to ensure a collaborative and respectful group work environment is to seek your instructor's support.

Your instructor will, based on the information provided, take the appropriate actions. In one example, the course instructor requested a weekly meeting with the troubled group and a detailed update from each member. The underperforming member suddenly realized that they could not hide anymore and started to allocate more time for the group work in an attempt to make a recovery. Things started to turn around simply because of the instructor's intervention.

Hopefully, this chapter covers the whole spectrum of challenges you might face with your group, but just in case, check out [Chapter 20](#) for additional resources on group conflict resolution.

18.

## Chapter 18: Dealing with other Course Related Issues (Coming Soon)



PART V

**PART 5 - What's In My  
Toolbox?**



PART 5

**WHAT'S IN MY  
TOOLBOX?**

19.

## Chapter 19: My Tools



## Tools for Chapter 2: Group Formation

- Team Profile
  - [Proposal template](#)
  - [Sample BTM team profile](#)
  - Sample Group Resume – <https://www.cmu.edu/teaching/designteach/teach/instructionalstrategies/groupprojects/tools/SkillsInventoriesGroupResumes/GroupResume.docx>
  - While this article speaks to webpages, inspiration for your profile can certainly be gleaned here <https://www.smashingmagazine.com/2010/06/meet-the-team-pages-examples-and-trends/>
  - Check out this [skills inventory](#) from Carnegie Mellon University
  - Competency test – <https://www.123test.com/competency-test/>
  - Skills survey – <https://www.mindtools.com/pages/article/get-started.htm>
  - 10 career self-assessment tools – <https://www.monster.com/career-advice/article/best-free-career-assessment-tools>
- Roles and responsibilities template

- Project management guide for everything RACI – <https://www.smartsheet.com/comprehensive-project-management-guide-everything-raci>
- Delegation checklist – <https://d2myx53yhj7u4b.cloudfront.net/sites/default/files/IC-15-Item-delegation-checklist.pdf>
- [Proposal templates and info](#)
- Group contract templates
  - [BTM team contract template](#)
  - [Sample Team Contract](#)
  - [Team Contract Template](#)
  - [Group Contract](#)
  - [Sample Group Contract](#)
  - [UWaterloo Sample Group Contract](#)
  - [Guidelines for Writing Team Contracts](#)
  - [Team Contract Template](#)

## Tools for Chapter 3: Securing a Client

- Pitching to the client
  - How to pitch a project –

[https://www.youtube.com/  
watch?v=dak2DkfDTuU](https://www.youtube.com/watch?v=dak2DkfDTuU)

- 6 Psychological tricks to make people like you immediately –

[https://www.youtube.com/  
watch?v=a-Zhah7VSGQ](https://www.youtube.com/watch?v=a-Zhah7VSGQ)

- The elevator pitch –

[https://www.youtube.com/  
watch?v=phyU2BThK4Q](https://www.youtube.com/watch?v=phyU2BThK4Q)

- Presenting to clients

- 5 Steps to a killer presentation opener –

[https://www.youtube.com/  
watch?v=dEDcc0aCjaA](https://www.youtube.com/watch?v=dEDcc0aCjaA)

- How to create an awesome slide presentation – [https://www.youtube.com/  
watch?v=6bSOAl1i8bw](https://www.youtube.com/watch?v=6bSOAl1i8bw)

- The surprising secret to speaking with confidence – [https://www.youtube.com/  
watch?v=a2MR5XbJtXU](https://www.youtube.com/watch?v=a2MR5XbJtXU)

- How to present your ideas clearly – [https://www.youtube.com/  
watch?v=avew5rVAwi0](https://www.youtube.com/watch?v=avew5rVAwi0)

- Presentation decks

- How to give an awesome presentation – <https://www.youtube.com/>

[watch?v=i68a6M5FFBc](#)

- Raw Shorts explainer video platform –  
<https://www.rawshorts.com/>

## Tools for Chapter 4: Creating Effective Deliverables

- Project management apps/platforms:
  - <https://monday.com/>
  - [www.basecamp.com](http://www.basecamp.com)
  - <https://blog.capterra.com/free-open-source-project-management-software/>

## Tools for Chapter 9: Solution Phase

- Risk assessment matrix
  - <https://view.officeapps.live.com/op/view.aspx?src=https://d2myx53yhj7u4b.cloudfront.net/sites/default/files/IC-Communication-Strategy-Risk-Assessment-Matrix-WORD.dotx>

## Tools for Chapter 13: Keep Your Client Informed

- Communications plan templates
  - Communication Plan Template –  
<https://www.projectmanager.com/templates/communications-plan-template>
  - Internal and external communication plan template – <https://view.officeapps.live.com/op/view.aspx?src=https://d2myx53yhj7u4b.cloudfront.net/sites/default/files/IC-Internal-External-Stakeholder-Communication-Plan-Template.dotx>
  - Communications management plan –  
<https://view.officeapps.live.com/op/view.aspx?src=http://www.projectmanagementdocs.com/template/Communications-Management-Plan.doc>
- SMART Goals template –  
<https://view.officeapps.live.com/op/view.aspx?src=https://d2myx53yhj7u4b.cloudfront.net/sites/default/files/IC-Communication-Strategy-SMART-Goals-Template-WORD.dotx>
- SoW/Charter templates
  - <https://www.smartsheet.com/free-statement-work-templates>

- <https://templates.office.com/en-us/Statement-of-Work-Red-design-TM03923594?ui=en-US&rs=en-US&ad=US&fromAR=1>
  - <https://templates.office.com/en-us/Statement-of-work-TM01184032?ui=en-US&rs=en-US&ad=US&fromAR=1>
  - How to write an SoW <http://peopleprocessandprofit.com/2010/08/25/how-to-write-a-sow/>
  - Other SoW and Charter templates [https://drive.google.com/drive/folders/1dfP9Phmxs645WkUC9ZuELG\\_mAthiCtmU?usp=sharing](https://drive.google.com/drive/folders/1dfP9Phmxs645WkUC9ZuELG_mAthiCtmU?usp=sharing)
- NDA templates
    - <https://www.lawdepot.ca/contracts/non-disclosure-agreement/#.WvBdTdMvzOQ>
    - [https://www.legalcontracts.com/contracts/confidentiality-agreement/?loc=CA&pid=googleadwords-confid\\_ca-nondisclosureL1\\_m2-ggkey\\_nda%20template&gclid=CjwKCAjw8r\\_XBRBkEiwAjWGLlCQnCCockL\\_1rOuo1agyzqfohB5wa52EK6MJw0xFYyZQqjKQkAvJOBoCaGoQAvD\\_BwE](https://www.legalcontracts.com/contracts/confidentiality-agreement/?loc=CA&pid=googleadwords-confid_ca-nondisclosureL1_m2-ggkey_nda%20template&gclid=CjwKCAjw8r_XBRBkEiwAjWGLlCQnCCockL_1rOuo1agyzqfohB5wa52EK6MJw0xFYyZQqjKQkAvJOBoCaGoQAvD_BwE)

- <https://www.wonder.legal/en-ca/modele/non-disclosure-agreement-nda-en-ca>

## Tools for Chapter 17: Keep Your Client Partnered

- CR templates/samples
  - Example change request form –  
[https://view.officeapps.live.com/op/view.aspx?src=https://www2a.cdc.gov/cdcup/library/templates/CDC\\_UP\\_Change\\_Request\\_Form\\_Example.doc](https://view.officeapps.live.com/op/view.aspx?src=https://www2a.cdc.gov/cdcup/library/templates/CDC_UP_Change_Request_Form_Example.doc)
  - Change request form template –  
[http://www.fdot.gov/it/PDM/8\\_Project\\_Management/Change\\_Control\\_Request\\_Form.docx](http://www.fdot.gov/it/PDM/8_Project_Management/Change_Control_Request_Form.docx)
  - Sample change request form –  
[https://view.officeapps.live.com/op/view.aspx?src=https://pma.doit.wisc.edu/DoIT%20Templates\\_Examples/Stage%203%20-%20Plan/Stage%203%20Plan%20Examples/3.3.4%20Example%20-%20Change%20Request%20Form,%20v2.0.doc](https://view.officeapps.live.com/op/view.aspx?src=https://pma.doit.wisc.edu/DoIT%20Templates_Examples/Stage%203%20-%20Plan/Stage%203%20Plan%20Examples/3.3.4%20Example%20-%20Change%20Request%20Form,%20v2.0.doc)

20.

## Chapter 20: Other Resources

### **Resources for Chapter 3: Securing a Client**

#### **Getting Clients: Approaching the Company**

<https://www.smashingmagazine.com/2009/11/getting-clients-approaching-the-company/>

#### **Deciding whether or not to pursue a project**

<https://www.freshbooks.com/blog/project-worth>

### **Resources for Chapter 5: Intro to IT Consulting**

#### **Be The Best Consultant Ever: 6 Things That Will Make You Great**

<https://www.forbes.com/sites/dailymuse/2013/11/05/be-the-best-consultant-ever-6-things-that-will-make-you-great/#6c7f122395d6>

### **What Makes A Good Technical Consultant?**

<http://www.base36.com/2012/08/what-makes-a-good-technical-consultant/>

### **8 Characteristics of great consultants. Do you have what it takes?**

<https://www.pauwelsconsulting.com/consultancy-tips/characteristics-of-great-consultants-2/>

### **5 Ways to Keep Your Clients' Confidence High**

<http://www.base36.com/2012/12/5-ways-it-consultants-keep-their-clients-confidence-high/>

### **IT Consulting Status Reports**

<http://www.base36.com/2012/11/it-consulting-status-reports/>

## **Consultants and Workplace Relationships**

<http://www.base36.com/2012/06/it-consultants-and-workplace-relationships/>

## **Project Management Handbook**

[http://www.project-management-knowhow.com/  
project\\_management\\_handbook.html](http://www.project-management-knowhow.com/project_management_handbook.html)

## **Resources for Chapter 6: Analysis Phase**

### **How To Create The Perfect Client Questionnaire**

[https://www.noupe.com/business-online/freelance/how-to-  
create-the-perfect-client-questionnaire.html](https://www.noupe.com/business-online/freelance/how-to-create-the-perfect-client-questionnaire.html)

## **Resources for Chapter 12: L[in]ked**

### **CRM tips**

<https://www.thebalancesmb.com/your-client-is-livid-2948293>

## **7 Best Practices For Building Client Relationships**

<https://www.forbes.com/sites/gaurisharma/2013/10/04/7-best-practices-for-building-client-relationships/#54379a0c5f91>

## **6 Tips to Managing Client Expectations**

<https://www.inc.com/michael-olguin/6-tips-to-managing-client-expectations.html>

## **IT Consultants and Workplace Relationships**

<http://www.base36.com/2012/06/it-consultants-and-workplace-relationships/>

## **5 Ways IT Consultants Keep Their Clients' Confidence High**

<http://www.base36.com/2012/12/5-ways-it-consultants-keep-their-clients-confidence-high/>

## **Keys to Successful Consulting Projects**

<http://thinklikecenter.com/consultant/keys-to-successful-projects>

## **How To Identify And Deal With Different Types Of Clients**

<https://www.smashingmagazine.com/2009/10/identifying-and-dealing-with-different-types-of-clients/>

### **Client Relationship Management Concepts**

<http://www.tradefinanceguru.net/students-zone/business-environment/01-client-relationship-management-concepts>

### **Managing Client Expectations**

<https://www.inc.com/michael-olguin/6-tips-to-managing-client-expectations.html>

### **Building Lasting Relationships with Clients**

<https://www.freshbooks.com/blog/6-tips-for-building-lasting-relationships-with-clients>

### **Your Client is Livid**

<https://www.thebalance.com/your-client-is-livid-2948293>

### **Best Practices for Building Client Relationships**

<https://www.forbes.com/sites/gaurisharma/2013/10/04/7-best-practices-for-building-client-relationships/#27ac74045f91>

### **Ways to Listen Better**

[https://www.ted.com/talks/julian\\_treasure\\_5\\_ways\\_to\\_listen\\_better](https://www.ted.com/talks/julian_treasure_5_ways_to_listen_better)

### **What Your Client Wants**

<https://www.proposify.com/blog/what-your-client-wants>

### **10 Things Every Customer Wants**

<https://www.inc.com/geoffrey-james/10-things-every-customer-wants.html>

### **Ten Things Clients Most Want From You**

<https://books.google.ca/books?id=wm9w5J8zXEsC&pg=PT450&lpg=PT450&dq=ten+things+clients+most+want+from+you+dummies&source=bl&ots=0wXS8UOHV&sig=WLIsmYnN9tbLUzOaeOXoFb7iYL0&hl=en&sa=X&ved=0ahUKEwjSpbvA2NHAAhXsTN8KHSqlDJ8Q6AEIKzAA#v=onepage&q=ten%20things%20clients%20most%20want%20from%20you%20dummies&f=false>

## **Resources for Chapter 13: Keep Your Client Informed**

### **Project Team Members Roles and Responsibilities**

<https://www.luc.edu/pmo/resources/projectteammembersrolesandresponsibilities/>

### **Project Roles and Responsibilities**

[https://view.officeapps.live.com/op/view.aspx?src=https://mn.gov/admin/assets/project\\_roles\\_responsibilities\\_tcm36-202677.docx](https://view.officeapps.live.com/op/view.aspx?src=https://mn.gov/admin/assets/project_roles_responsibilities_tcm36-202677.docx)

### **Five Critical Roles in Project Management**

<https://hbr.org/2016/11/five-critical-roles-in-project-management>

### **Stakeholder Analysis Matrix Template**

<https://view.officeapps.live.com/op/view.aspx?src=https://d2myx53yhj7u4b.cloudfront.net/sites/>

[default/files/IC-Communication-Strategy-Stakeholder-Analysis-Matrix-WORD.dotx](#)

## **Putting Every Project in Writing**

<https://books.google.ca/books?id=wm9w5J8zXEsC&pg=PT295&dq=%22working+without%22+freelancing+for+dummies&hl=en&sa=X&ved=0ahUKEwihyJCmydHaAhXmnuAKHeybDCYQ6AEIKTAA#v=onepage&q=%22working%20without%22%20freelancing%20for%20dummies&f=false>

## **Resources for Chapter 16: Keep Your Client Engaged**

### **The Top Ten Client Feedback Questions**

<https://asparker.com/blog/2015/09/the-top-ten-client-feedback-questions/>

### **Tips and Examples for Getting Client Feedback**

<https://photographyspark.com/tips-and-examples-for-getting-client-feedback/>

## **How to Get Feedback as a Freelancer**

<https://hbr.org/2015/08/how-to-get-feedback-as-a-freelancer>

## **How to Get Feedback When You're a Freelancer**

<https://www.and.co/blog/freelance-knowledge/freelancer-feedback-process/>

## **A Consultant's Guide to Difficult Client Feedback**

<https://hbr.org/2015/08/a-consultants-guide-to-difficult-client-feedback>

## **Asking for Feedback**

[https://books.google.ca/books?id=wm9w5J8zXEsC&pg=PT215&lpg=PT215&dq=%22asking+for+feedback%22+freelancing+for+dummies&source=bl&ots=0wXS8TUBSf&sig=CdmipCNEuVXbRcJM\\_Tqpz3BR Rx4&hl=en&sa=X&ved=0ahUKEwjK6KOex9HaAhXhhOAKHW5BC0EQ6AEIMDAB#v=onepage&q=%22asking%20for%20feedback%22&f=false](https://books.google.ca/books?id=wm9w5J8zXEsC&pg=PT215&lpg=PT215&dq=%22asking+for+feedback%22+freelancing+for+dummies&source=bl&ots=0wXS8TUBSf&sig=CdmipCNEuVXbRcJM_Tqpz3BR Rx4&hl=en&sa=X&ved=0ahUKEwjK6KOex9HaAhXhhOAKHW5BC0EQ6AEIMDAB#v=onepage&q=%22asking%20for%20feedback%22&f=false)

## **Resources for Chapter 17: Keep Your Client Partnered**

### **3 Reasons Why Conflict Can Be Good for Relationships**

<https://www.psychologytoday.com/us/blog/constructive-wallowing/201601/3-reasons-why-conflict-can-be-good-relationships>

### **How Conflict Can Improve Your Relationship**

<https://psychcentral.com/lib/how-conflict-can-improve-your-relationship/>

### **How to Save a Difficult Client relationship**

<http://thegetrealproject.com/resources/how-to-save-a-difficult-client-relationship/>

## **Resources for Chapter 18: Resolving Client Issues**

### **How to Convince Clients They're Wrong (Without Losing Their Business)**

<http://thinkapps.com/blog/post-launch/how-to-convince-clients-they-are-wrong/>

## **Resources for Chapter 19: Resolving Group Issues**

### **Group Work: Dealing with Conflicts**

<http://www.ryerson.ca/content/dam/lt/resources/handouts/GroupWorkConflict.pdf>

### **Resolving Conflict**

<http://learningcommons.ubc.ca/student-toolkits/working-in-groups/resolving-conflict/>

### **8 Steps for Conflict Resolution**

<https://www.talent.wisc.edu/home/HideATab/FullyPreparedtoManage/ConflictResolution/tabid/297/Default.aspx>

## **Burnout Prevention and Treatment**

<https://www.helpguide.org/articles/stress/burnout-prevention-and-recovery.htm>

## **How to Avoid Burnout in a High-Stress Environment**

<https://www.theglobeandmail.com/report-on-business/small-business/sb-managing/how-to-avoid-burnout-in-a-high-stress-environment/article35777949/>

## **Dealing with Stress**

<https://www.skillsyouneed.com/ps/stress-tips.html>

## **9 Ways To Prevent Burnout**

<https://www.lifehack.org/articles/lifestyle/9-ways-to-prevent-burnout.html>

## **62 Stress Management Techniques & Tips To Prevent A Burn Out**

<https://positivepsychologyprogram.com/stress-management-techniques-tips-burn-out/>

## **7 Strategies to Prevent Burnout**

<https://www.psychologytoday.com/us/blog/pressure-proof/201306/7-strategies-prevent-burnout>

## **7 Powerful Ways To Beat Burnout**

<https://www.forbes.com/sites/travisbradberry/2016/11/08/7-powerful-ways-to-beat-burnout/#4f14ea3c61e6>



# Back Matter Cover



# BACK MATTER

Glossary, Index, and Other References

# Yearbook

By now you should feel equipped and strengthened to hit the ground running when your Capstone course starts. Chapters 1-20 contain a wealth of information based on research and experience to ready you in the best possible way for what's to come. And if that wasn't enough, we have a cherry and some sprinkles for that ice cream! What better advice could you receive than that from those who have gone through the trenches before you? Here are some nuggets of wisdom from those who have recently run, clawed, and even cartwheeled out to the other side. May you find encouragement and inspiration in these words.



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<https://pressbooks.library.ryerson.ca/itmcapstonesurvivalguide/?p=163>

# Glossary of Terms and Funky Acronyms (Coming Soon)



# Index (Coming Soon)



# Questions?

You've got questions and we, hopefully, have answers. See the below list for contact options.



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<https://pressbooks.library.ryerson.ca/itmcapstonesurvivalguide/?p=25>

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