Second Client Meeting Guide

PST 315: Methods of Policy Analysis and Presentation

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Congratulations! You have completed your first client meeting and your contract and timeline. At this point, you should have a second meeting scheduled with your client to go over questions for the Organizational Assessment, as well as gain further clarity on any questions you have about your project.

Before your second client meeting, make sure to spend some time thinking about your project and making a list of any questions that come up. These questions might be about the scope of your project, details on the survey or data, or their expectations for the final report. It is best to ask any questions as soon as they arise – this is how you prevent issues from popping up down the line!

Also, before your second meeting, you should review the Organizational Assessment. This assignment's purpose is for you to better understand your client's organization. By having a better understanding of their organization's goals, you can better tailor your report to their needs (and it will help you create your introduction and executive summary sections of your report!). Prepare questions ahead of time to guide the conversation surrounding the Organizational Assessment.

In your meeting, you have a few things you should cover.

- **Ask your client if they have a list of research questions** that your report should help answer. If they don't already have these, you should work together to create a list.
  - *Tip:* Ideally you should have a minimum of seven research questions to equate to the minimum of seven findings in your report. More than seven is absolutely acceptable.
  - *Tip:* Sometimes the client will have some ideas but will need help refining their research questions – work through this with them in your meeting to ensure everyone is happy and understands what will be answered in the report!
- **Discuss the questions for the Organizational Assessment you prepared.**
  - *Tip:* Questions 1, 3, and 4 on the assignment will need to be discussed with your client.
- **Ask your client if they have any questions or changes** since your last meeting.
  - *Tip:* Keeping an open dialogue and asking your client if they have questions or changes throughout the semester will ensure a happy client and a happy

consultant on the same page!

If you have any questions, please do not hesitate to reach out to your UCA.