Assignment #8 (P2): Potential Client Meeting Minutes

Congratulations! Your group is getting closer to being officially hired to conduct the Usability Test for your target company and you have scheduled your first meeting with them. It is an exploratory meeting during which your potential clients will clarify what their expectations are.

- you will introduce your team members
- you will present your preliminary research about their website and sites comparable to theirs
- you will request confidential information from your clients and agree to sign a Non-Disclosure form
- you will provide a preliminary:
  - overview of the steps necessary in performing a Usability Test
  - projection of time frame for the completion of each step
- you will agree on:
  - how often interim Progress Reports will be provided
  - anticipated completion date
- you will cover issues specific to your client and the industry in which they operate
- whatever else you imagine might need to be addressed

After this meeting, your group will prepare a 1-2 page Memo addressed to your Project Manager (me) that gives a detailed record of your first client meeting after which you hope to be contacted and awarded the contract.

Include:

- Who was present at the meeting
- Date and location of the meeting
- Start time
- End time
- Topics discussed
- Any decisions made: dates and times of future meetings, deadlines, documents to produce, projects, etc.
- Short paragraph (150 words) of reflection: How did you feel the meeting went? Did your group successfully make its pitch? Did each member get to speak and have his/her opinions heard? What kind of rapport did you feel you had with the client? Be specific!

Part of this memo's purpose is to construct your ethos: your detailed record-keeping will help you keep track of what transpires between your group and your client: e.g., if you ever need to refer to compromises or negotiations, you will have an official record of your meeting and who said what to whom and when.

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<tr>
<th>Group 1</th>
<th>Group 2</th>
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<th>Group 4</th>
<th>Group 5</th>
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<th>Group 7</th>
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<tbody>
<tr>
<td>Daisy</td>
<td>Amelia</td>
<td>Greg</td>
<td>Alejandra</td>
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<td>Elyse</td>
<td>Isabel</td>
<td>Joe</td>
<td>Casey</td>
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<td>Erica</td>
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<td>Sherri</td>
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