# Dr. Derr Part One

Video 1a (0:40). What do you think the client's first impressions were of the consultant? What are some specific things that contributed to that impression? Consider the physical layout of the room, the attention of the consultant, eye contact, phyiscal contact, and client comfort.

Video 1b (0:37). How is the client's first impression different? What are some specific things that changed?

Video 2a (0:40). What non-verbal cues is the consultant giving to the client? What about from the client to the consultant? (There is not supposed to be sound.)

Video 2b (1:09) How were the non-verbal cues different? Why are these non-verbal cues important? (Again, no sound).

A helpful way to structure a meeting is with the POWER process.

How did Dr. Derr Prepare? What else might you do?

Practice the Opening of a meeting with a partner, using the ideas from the LISA handout of 1) introduction, 2) time conversation, 3) wanted conversation (and agreement). What's your reaction to trying opening a meeting in this way?

# Homework 3 (due Wed Feb 15)

I've video-recorded a sample collaboration meeting (a link to view online will be sent by email), and I want you to watch it and 1) reflect on how it went, 2) write a follow-up email to the client, with a 3) proposed collaboration plan. We'll discuss more about some of these on Wednesday.

- For your reflection, please address
  1. Non-verbal communication and setting: What did you notice, both good and bad?
  2. Opening: Describe the opening. Did the consultant follow the recommendations of the POWER process? What did they agree to try to accomplish in the meeting?
  3. Work: Asking good questions: What kind of questions did the consultant ask? Give an example of a question you thought was particularly good, and the time it happened, and explain why it was a good question.
  4. End: How did the meeting end? Did the consultant follow the recommendations of the POWER process?
- Please write a followup email you might send to this client, following the guidelines from when we talk about the End of the meeting.
- For the collaboration plan, please follow the "Parts of a Collaboration Plan" handout. For this case, I expect it will fit on one side of a paper, if you don't put too much spacing in it. For the analysis plan, it's okay to be rather vague, and just list some possible methods that will be used, and why they might be appropriate for answering the questions of interest.

To be convincing to the client, you should be careful not to use any of their words directly. Please rephrase all information in your own words!

**LISA (Laboratory for Interdisciplinary Statistical Analysis)**
Department of Statistics, Virginia Tech
*www.lisa.stat.vt.edu*

# *The POWER Process for Statistical Collaboration Meetings:*
## **P**repare **O**pen **W**ork **E**nd **R**eflect

(This process has been adapted with permission from the work of Dr. Doug Zahn: zahn@stat.fsu.edu)

**Prepare** – Mentally and physically prepare for the meeting

- Review the materials the clients sent you, specifically the initial request for help.
- Review any unfamiliar terminology or statistical methods in the request.
- Arrive at the meeting room early to be sure it is prepared for the meeting (tidy up).
- Mentally prepare yourself for the meeting (do what you need to do so you can focus on the client and his or her research/business questions).
- Have a flexible plan for the meeting.

**Open** – Open the meeting correctly to set up the plan for the rest of the meeting

- Introduce yourself to the client. Smile. Shake hands. Make eye contact.
- **Time conversation** – Check if the scheduled meeting time still works for everyone and whether they can stay longer if needed. Ask: “Does it still work for you to meet for (1 hour)? If we’re being productive, for how long after (1 hour) could you stay?”
- **Wanted conversation** – Ask what the client wants to accomplish during this meeting.
  - Paraphrase the client’s wants in your own words and ask: “Is there anything else?”
  - Summarize and prioritize a plan for the rest of the meeting from the client’s wants.
- Willing – Determine if you are willing to accomplish what the client wants.
- Able – Determine if you are able to accomplish what the client wants.

**Work** – Learn about the project and work with the client to address their wants

- Overall Research Goals – Ask about the client’s overall goals and determine the “why” of the research/business question. Why is this question important to the client/company/stakeholders?
- Seek first to understand, then to be understood. Be sure the client understands the statistical information you are sharing with them. If you are unsure about something, ask. If they can’t explain the statistical methods to their bosses, they probably won’t use the method.
- Stay on track and efficient with time. Be sure you are addressing the client’s wants.
- Answer questions completely, with no intentional omissions. Be respectful.
- If you do not know the answer to a question, tell the client that you will look into it – do not give the client an incorrect answer or fake your understanding.

**End** – Summarize the meeting and outline the next steps for the project

- Leave enough time so that you can perform all the steps of End and leave on time.
- Summarize any decisions made at the meeting.
- Determine if each of the wants were satisfactorily addressed by asking the client.
- If a want was not satisfactorily addressed, devise a plan to address it.
- What will each individual be doing before the next meeting and what is the timeline?

**Reflect** – Determine what went well and what didn’t go well during the meeting

- If a breakdown occurred, determine how and then why it occurred.
- Reflect on what you would do differently in the future.

# Parts of a Collaboration Plan:

The purpose of the collaboration plan is twofold: 1) to convince the client that you understand the background and their goals well enough that they should work with you, and 2) to set expectations about what your collaboration will look like.

The audience for this plan is your client, so it should all be written directly to them. That is, don't say "the client," say "you."

**Background and Goals:** Describe the subject matter background. Why is the research important? What questions should be answered at the end of the study? Describe variables and data only enough to make the context is clear.

**Study Design and Data:** If have data already, where did the data come from? How was it chosen (sampling plan)? How much data is there? If a designed study, what was the experimental design? Explain what the observational units are and what variables were measured. (If study not performed yet, this will look different; your job may be to help determine these things.)

**Analysis Plan:** What descriptive statistics and graphics will you make? What models/analyses will you run, and what questions will they answer? Which variables will you use and how? What will you report from these analyses, and how will that answer the subject matter question? This may vary from quite detailed to rather vague, depending on the project.

**Expectations about Publications:** Is a publication expected to result from this work? If so, how will your contribution be acknowledged, and what expectations to you have about that process?

**Data Confidentiality:** Is there confidential data that needs to be safeguarded? If so, what precautions will be taken? What will happen to the data and any analyses or reports after the project is completed?

**Personnel and Responsibilities:** Who is involved in the project, on both the client and the consultant side? What are their roles? Who is your primary contact on the project?

**Communication:** How will you communicate when questions arise? How quickly will you try to respond to communication from the client (and vice versa)? How will fuuture meetings be arranged?

**Tasks, Timeline, and Costs:** What kind of tasks will you be involved with (steps in the project), and what is the timeline for these? Depending on the project, this may range from quite detailed to rather vague. If this is a paying client, the estimated costs and how they relate to these tasks should be outlined, as well as what expectations are for payment.

STAT8801, February 6, 2017

Name: ________________________

We discussed some guidelines, tips, and recommendations about several aspects of meeting with clients today, including non-verbal communication, structuring a consultation, preparing for and opening a meeting, and asking good questions.

What did you find particularly interesting or new to you?

STAT8801, February 6, 2017

Name: ________________________

We discussed some guidelines, tips, and recommendations about several aspects of meeting with clients today, including non-verbal communication, structuring a consultation, preparing for and opening a meeting, and asking good questions.

What did you find particularly interesting or new to you?