

# MILESTONE

*Providing Stepping Stones  
Along the Path to Success*



A WOMAN-OWNED  
SMALL BUSINESS

STEPS TO  
CONDUCTING  
A STRUCTURED  
CLIENT INTERVIEW

Before you start a project, it is important to make sure that everyone is on the same page about what the project should achieve. Not every project is started under the ideal circumstances. I know you've had a project where there's not much lead time for planning or projects where the customer didn't know exactly how the project should look at completion from the very beginning.

Regardless of how the project begins, you should always make time to interview the customer and gain as much information as you can about the direction the project is headed. There are many benefits of conducting a requirements interview.

- You can identify the real needs, requirements, and goals of the project
- You can determine the steps of action to fulfill the requirements
- You can know ahead of time the real measurements of success
- You can prioritize the requirements for better tracking
- You can increase your chance of success by knowing all the goals and requirements up front

If you haven't been part of many client interviews, there may be some stress going into it. What if you forget to ask something that causes future delays in the project? Consider the following steps to conducting structured interviews.

#### ***Lay the proper foundation***

Explain that conducting the interview is part of guaranteeing the success of the project. Communicate to the customer that this project is important to you, and you want it to succeed.

#### ***Make this event relaxed***

This is not the time to be combative, only to understand the customer's goals. Let the customer share everything they want the project to accomplish.

#### ***Take notes and document comments***

This allows the customer to see and understand your seriousness. It also makes sure you won't forget anything that is said and gives a frame of reference for follow-up questions.

#### ***Be supportive***

This means making comments which allows the customer to know you see where he or she is going. Make suggestions as needed, but you want to follow the customer's lead.

#### ***Get detail, detail, detail***

Asking and probing for the real meaning behind each comment is imperative to conducting a great interview. Make sure you understand what the customer is thinking before moving on.

Join Dr. Mathis on Friday, April 16 for our free *Keeping Project Deliverables High* webinar. This 1-hour webinar will compare internal, external, process, and project deliverables. Understanding how each type of deliverable contributes to performance can support success in any project. If you cannot attend, a replay link will be sent out after the webinar. To register, go to [www.themathisgroup.com/webinars](http://www.themathisgroup.com/webinars).

## UPCOMING FREE WEBINAR

### KEEPING PROJECT DELIVERABLES HIGH

FRIDAY, APRIL 16  
10:00 - 11:00 AM CST  
1 PDU

TO REGISTER, GO TO  
[www.themathisgroup.com/webinars](http://www.themathisgroup.com/webinars)



SATISFIED CLIENT  
OF THIS COURSE  
STATE OF KANSAS

# PROACTIVE COMMUNICATION AND INTERVIEW SKILLS FOR GATHERING BUSINESS REQUIREMENTS - 1 DAY

***PDU's - 6.5***

**PMI's Talent Triangle Breakdown**

Technical - 3.25

Leadership - 3.25



face-to-face



virtual  
instructor-led

**Course Description:** This one-day course will focus on ways to use communication to gather detailed information from the customer, analyze the information, and expedite the outcomes desired by the customer. Participants will understand how to focus a message and incorporate means to gain information using effective communication skills. This course will recommend ways of building stronger communication skills and will provide insight to different communication styles. Participants will learn new power by using certain words to impact the message and by asking questions that get noticed. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

## **Course Objectives:**

### **Objective 1: Evaluate how to approach people**

Identify perception

Examine what impacts perception

Compare reducing perception differences

### **Objective 2: Discuss how to gain understanding**

Analyze communication styles

Develop ways to increase understanding

Compare kinds of communication

Describe what communication should be communicated upline

Examine reasons why communicating upline is extremely difficult

Identify questions to ask if miscommunication is common

Discuss how to match your body language and the message

List characteristics of a poor listener

Predict obstacles of listening

Identify ways of asking questions which open up communication

### **Objective 3: Examine techniques for disagreeing**

Discuss caution signs that a disagreement is turning into a conflict

### **Objective 4: Create questions which explore the customer's desires and requirements**

Recognize which follow up questions will detail the expressed wishes of the customer

Analyze the interview data and determine true requirements of the customer

Develop a sequence of questions which encourages customers to give information freely

Examine feedback techniques for clarifying the real message being given from the customer

Evaluate the best feedback technique to use in mirroring the requirements back to the customer for approval

Analyze interview skills that will give insight into any project

### **Objective 5: Discuss which areas to brainstorm when doing a client project**

Examine how to set project objectives that are measurable and realistic

Discuss collecting data and information

Evaluate how to analyze a problem

Analyze the best skills and personnel needed to successfully fulfill this project

Evaluate ways to create a project plan, set expectations, and monitor progress



A WOMAN-OWNED SMALL BUSINESS (WOSB)



Providing quality, customized training and consulting services that inspire, educate, and equip organizations to be better tomorrow than they are today.

DR. KEITH MATHIS, PMP, PMI-ACP, CSM  
WANDA MATHIS, M.ED. PMI-ACP

# PROJECT MANAGEMENT TRAINING

OVER 60 PROJECT MANAGEMENT COURSES REGISTERED WITH PMI

PRESENTATIONS THE EDUCATE, MOTIVATE, AND INSPIRE

Since 1993, The Mathis Group has been helping organizations change worker productivity and behavior.

PROJECT MANAGEMENT  
MARKETING  
MOTIVATION  
ORGANIZATIONAL BEHAVIOR  
LEADERSHIP  
CUSTOMER SERVICE

## COMPANY MANDATE

The Mathis Group provides training and consulting that will impact the organization and individual while maintaining an outstanding reputation for success and integrity.

## VALUES STATEMENT

Every person has worth and should be treated with respect.

## AREAS OF EXPERTISE

- Curriculum Design
- Project Management
- Organizational Behavior and Development
- Management
- Marketing
- Strategic Planning
- Executive Coaching
- Performance
- Team Building
- Emotional Intelligence
- Leadership
- Customer Service
- Creating Customer Value
- Supervisory Leadership
- Coaching and Counseling

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