

Meeting the Client: Learning the Capstone Student's Perspective through the Three-Intelligences Methodology

B. Kris Jaeger-Helton (Northeastern University), Susannah Howe (Smith College), John K. Estell (Ohio Northern University)

Introduction and Inspiration

With Capstone, meeting the sponsor/client is a key aspect of launching a project, whether in industry, the community, or internal to the university. The authors have previously developed a set of rubrics and an accompanying checklist to support capstone students in preparing for and executing their meetings with clients, with particular focus on the initial meeting. This document (the "Rubric") is shown below.

Student-Client Interaction Rubric: Initial Meeting		Rating for Student Team	Comments
		Check one per row, or subchecklist item if not relevant	Provide comments for each effective section, especially for performance marked above or below expectations
Performance Objectives	Meets Expectations	<input type="checkbox"/> Confirms meeting time, length, mode, location	
		<input type="checkbox"/> Has project brief provided by client or faculty	
		<input type="checkbox"/> Researches company/organization/industry/client	
		<input type="checkbox"/> Researches competitors, comparable organizations	
		<input type="checkbox"/> Identifies & researches client/industry/organization	
		<input type="checkbox"/> Plans meeting discussion topics/agenda for meeting	
		<input type="checkbox"/> Confirms time, date, location, mode of meeting	
		<input type="checkbox"/> Discusses client/industry/organization/competitor	
		<input type="checkbox"/> Discusses key stakeholders beyond client/organization	
		<input type="checkbox"/> Defines success: short-term & long-term goals	
	<input type="checkbox"/> Confirms relevant client/industry/organization & skills		
	<input type="checkbox"/> Reviews client responsibilities of students & client		
	<input type="checkbox"/> Discusses modes for sharing info, data, & resources		
	<input type="checkbox"/> Confirms meeting responsibilities of organization		
	<input type="checkbox"/> Addresses relevant legal issues (IP, NDA, HIPAA)		
	<input type="checkbox"/> Appropriately summarizes client's needs		
	<input type="checkbox"/> Identifies additional questions/needs/research		
	<input type="checkbox"/> Defines opportunities and alternatives with client, including budget		
	<input type="checkbox"/> Demonstrates ability to manage/coordinate regarding agenda & responsibilities of organization		
	<input type="checkbox"/> Confirms that meeting goals/objectives were met		
	<input type="checkbox"/> Reviews and updates questions from the meeting		
	<input type="checkbox"/> Articulates next steps, action items, and owners		
	<input type="checkbox"/> Distributes meeting format, flow, and outcomes		
	<input type="checkbox"/> Sends thank you to client meeting		
	<input type="checkbox"/> Sends recap/briefing after meeting		
	<input type="checkbox"/> Confirms plan for achieving next meeting		
	<input type="checkbox"/> Demonstrates responsibility for client's account		
	<input type="checkbox"/> Discusses how meeting/interaction was productive		
	<input type="checkbox"/> Starts, moves through, and ends meeting on time		
	<input type="checkbox"/> Displays knowledge, resources, relevant terms		
	<input type="checkbox"/> Avoids language that precludes productive goals		

Overlapping Interests:

Client wants effective meeting where all key concerns and project elements are addressed

Instructor wants to prepare students for professional interactions, facilitate student ownership, and meet client needs

Student wants to be prepared, address all relevant issues with client and understand their role

Motivating Questions:

- How do we serve the client while
- ensuring student buy-in?
 - promoting critical thinking?
 - highlighting value of teamwork?

Teams' Items in Common with the Rubric

Most teams had key elements in common with the established rubric, but not all. The most common items for Before, During, and Following the Initial Client Meeting are shown below.



Teams' Most-Missed Rubric Items - then Added

Some relevant rubric items initially had low inclusion by teams. On the left in each graph is the % of teams who originally included the item; on the right is the % who later added it.



The Three Intelligences

Phase 1: Individual Intelligence

- Questions are posed to all students
- Each student responds independently



Phase 2: Collaborative Intelligence

- Team members compare notes
- Common and unique ideas are noted

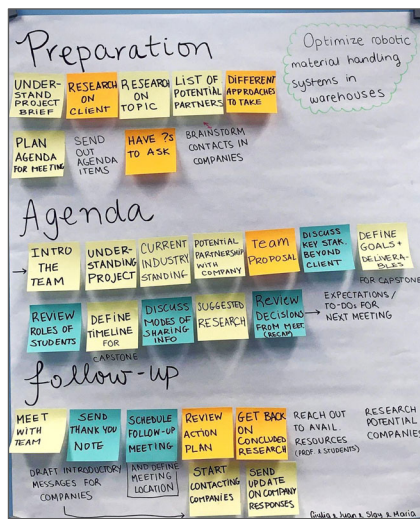
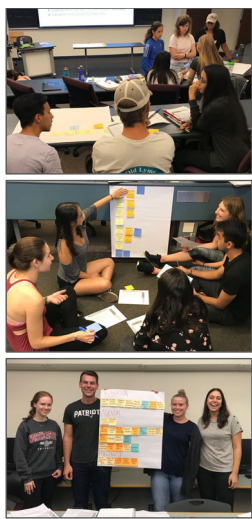


Phase 3: Collective Intelligence

- Instructor provides rubric of best practices
- Student teams use rubric to fill in gaps

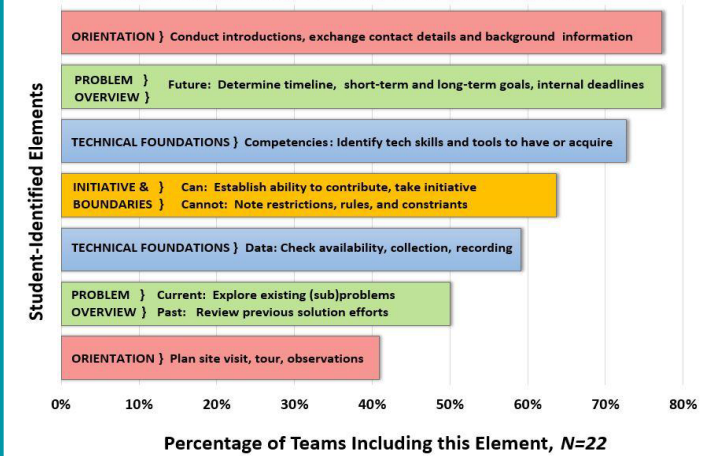


The Process and the Outcome



Elements from Students Not Found on the Rubric

We learned a lot about student uncertainties and their desire for specific assurances by analyzing what they chose to include that was NOT found on the Rubric, as shown below.



Discussion and Benefits

The three-intelligences methodology has many advantages, across the phases, and overall. This approach is adoptable and adaptable in various settings, applications, and time frames.

- Individual Intelligence:** Each student personally owns the problem and can have a voice
- Collaborative Intelligence:** Members bond over common ideas, appreciate individuals' ideas
- Collective Intelligence:** Students see they covered most aspects; Rubric can help fill in gaps
- Overall:** This process is inclusive, dynamic, generative, foundational, unifying, and enduring

Conclusions and Future Recommendations

- Methodology is highly intuitive, not complex
- Approach has a high level of student buy-in
- The exercise results in a usable work product
- Instructors can responsively reframe course
- Recommend using only 2-3 times per course
- Can be transformed into an online exercise
- Repeated interactions across institutions will result in ongoing modifications of the Rubric

Acknowledgements

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