

## Dr. Derr Part Two

Previously, Dr. Derr welcomed the client and made them feel comfortable. On to the Work of the consultation!

Video 3a (2:52): What questions does she ask the client? What information is she trying to obtain? Why didn't she get good answers?

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Video 3b (4:41): What was different? How did she ask questions differently? Be specific.

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Video 4 (5:04): Setting expectations. What specific things did they discuss?

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Refer to the “Parts of a Collaboration Plan”, sections 4-8. Did she get enough information to make these clear? What questions do you have about any of these sections?

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## Ending a meeting

### **PART ONE (in the meeting):**

- The end of a meeting should return to the “wanted” conversation from the beginning. Did you accomplish everything you’d hoped to? If not, make a plan for how you will continue to do so.
- What next steps will each person do?
- When will you next communicate and/or meet?

### **PART TWO (after the meeting):** After the meeting, you should send an email

- express thanks for meeting
- reiterate next steps for each person and when next communication is
- include proposed collaboration plan and ask for feedback (or that you will send one, and the expected timing)

Draft a follow-up email Dr. Derr might send to this client.

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## 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!

## 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 future 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.

Name: \_\_\_\_\_

Today we discussed the “Work” and “End” parts of a meeting. What did you find particularly interesting or new to you?

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