

## Instructors: Working with clients

### Time commitment

Know going in that doing a client project will involve a greater time commitment on your part. Estimates are an increase of 20-30% more time than a regular class.

### Finding or locating clients

All universities: ask your colleagues, friends, neighbors for recommendations. Look for local non-profits close to campus.

Large universities: check to see if you have an office of community engagement, which can assist with finding local partners. If you do not have an office of community engagement, check with academic affairs or the first-year experience because these people will likely be connected to many local organizations who have volunteer needs.

Mid-size and small universities: find projects that are on campus. Most of the large units on campus are generally in need of some type of professional and technical writing product.

### Initial Fact Finding Meeting

Once you have a preliminary list of potential clients, you have to find the time to meet with them. The initial meeting is designed to discuss what professional/technical writing is and how it can help their organization.

At this meeting you should provide a brief overview of types and kinds of projects done in the past (or if you're brand new you can use examples from the literature or give general types of products students can produce.)

You need to listen closely to the organization's goals and problems and then provide an overview of how you think your class can help them meet their goals.

## Follow-up After the Initial Fact Finding

You can follow-up the initial meeting with a thank you and the final determination of whether you want to pursue this project for your class.

If you choose not to move forward, be certain you assure them that it wasn't a good academic fit and you'll keep them in mind for future opportunities. I usually check in with these sorts of folks every few months to keep the relationship alive.

If you choose to move forward, then another meeting is set with the client to narrow down the deliverables for the term.

## Second Meeting with the Client

During the second meeting with the client, I have two primary agenda items: setting realistic goals and outlining the process.

To set realistic goals with the client, we discuss the course's learning outcomes and objectives and how the project helps students meet those goals. We also discuss the project's scope and settle on potential deliverables. For undergraduate classes, the client and I make a final list or a final determination of what the product will be. In graduate classes, we develop the list and then the class makes the final determination.

The purpose of outlining the process is to ensure that the client understands their responsibilities, the students' responsibilities, and the instructor's role and responsibilities.

- client responsibilities:  
provide a point person for all contact; understand that answers to questions and feedback need to be done in a timely fashion; provide additional information that may be necessary (e.g., logos in high resolution format, internal style guide, content, etc.)
- student responsibilities:  
manage the entire project from communication with the client to the actual work; they will develop a project and communication plan and forward it to the client for approval
- instructor role and responsibilities:  
facilitate the process; intercede only when communication breaks down; check-in with client every week or so to see how they feel about the process (Note: this is in addition to the usual teaching process and work with students in the class.)

## Summary document

- see sample attached

Write up a short agreement that gives a rough sketch of the timelines and provides an overview/summary of previous discussions. This document also includes the learning outcomes for the course. For graduate classes, I provide this summary document to the students. (In some advanced undergraduate classes I do as well, but not all the time.)

The summary document also includes key dates that the client will need to be available, i.e., coming to one of the first class periods, attending a final presentation.

This document serves something like a contract between you, the class, and the client.