Successfully Interviewing Your Project Customer and Gathering Detailed Requirements

By
Dr. Keith Mathis

Table of Contents

Successfully Interviewing Your Project Customer and Gathering Project Requirements

Project requirements are very important for creating and driving the project forward toward its successful completion. There are many who think there is little or no need to interview the customer. Many project managers are pressured to create a plan and get a team up and going fast with almost no information about what the project is to accomplish. Because of this pressure, the interview process is sometimes overlooked or done in a haphazard manner. The sad reality is that it has become the culture of many organizations to start a project without detailed requirements or a customer interview. To effectively use the steps discussed in this report may require you to reeducate the customer so he or she understands that it is in his or her best interest to participate in the interview with plenty of data and details.

When projects are created with no interview process, you discover that the project deliverables are created without any real foundational information. In some cases, the plan is only a skeleton of what the project is supposed to accomplish. As you interview your customer, do not be surprised that some of your questions have not yet been answered. This is due to evolutionary thinking which takes place in the early stages of a project. In those early stages, one will think of the foundational need of the project or what problem it will solve. Based on this understanding, the customer will create some basic project requirements. However, the customer might not have conducted any real analysis of the situation nor have they looked at how this project will impact internal processes or others within the organization. This is why when you begin asking questions, they discover the need to return to their management team or others and gather more information themselves.

Before we show you how to conduct a detailed requirements gathering interview with your customer, we want to go deeper into the pitfalls of not conducting one. This is used to establish a foundation for the need and to prevent future problems or misunderstandings concerning this action. The requirements gathering interview is not something nice to do; it is a necessity! It is the only way we can plan on increasing our potential of completing the projects with fewer headaches.

Pitfalls of Not Doing A Detailed Customer Interview

Today, unless a thorough business interview is undertaken, the project plan will have numerous pitfalls from scope creep to fast paced change. These pitfalls will cost the average project huge amounts of productivity and efficiency while increasing the potential of failure. What is a shame is that many of these pitfalls can be prevented, if only the project manager and project team had participated in a customer interview.

Pitfall #1 – Starting a project with an unclear target
Starting a project with an unclear target sounds like only a fantasy; however, each day many project managers will do this very thing! An unclear target can best be defined as a lack of details and understanding about the goal and objective that the project will deliver. Getting as much information about each of these components and target areas is very important to everyone on the team, to the success of the project, and to the clarity needed to hit that target every time.

Pitfall #2 – Neglecting to nail down measurable objectives
A second pitfall that many face is that the details of the project are not measurable and are very subjective in nature. When a project team is trying to run a project with subjective measurements, they really have no measurements at all. Due to this, it is unclear when they have actually reached the end of the project. It is almost impossible for someone to think that the project has been successful due to the fact that it is in the eyes of the customer, and people will always second guess their solution and add some additional piece or component to this project.

Pitfall #3 – Creating an atmosphere which enables scope creep
Scope creep is defined as the creeping of the project's parameters beyond what is specified in a detailed scope statement. Since the project team has begun a project with little or no information, it is almost certain that the scope is going to creep, and that it is going to go beyond the parameters as designated by the project team.

In seminar after seminar, one of the frustrations that project managers and team members discuss is how the scope creeps throughout the project and is considered a normal part of their culture. The idea of scope creep is something in which many customers will take full advantage, if allowed. It will over commit your project team and your resources. You especially see scope creep used as a normal part of internal behavior when employees are paid a salary and are looked at as "free" in relationship to resource expense. An example of this would be federal, state, city and county employees who are already on salary and working on projects. Most of the time, their salary is not considered in the budgeting process of the project and so, in jest, the employee is considered free. We know that this is not true. The employee is not free and only has a limited amount of time to allocate to the projects. Due to over scheduling, the "free" employee's time is committed anywhere from 125% to as much as 175% due to the creeping of the project's scope.

Pitfall #4 – Increasing the possibility of failure to your project
Pitfall number four revolves around increasing the possibility that the project will fail. Project failure is always possible, regardless of which project team is working. However, when you do not understand the target, you have increased the possibility that the team is going to misdirect the project. Many teams only possess a perception of the target rather than a real goal to be achieved. When this happens, it increases the potential that this project will fail and cost the organization a great deal of money.

It is very important to reduce these pitfalls. One of the strongest ways of being able to avoid this is to conduct a detailed requirements gathering interview.

Benefits of Conducting a Requirements Interview

When a project team conducts a requirements interview, there are some very positive benefits which can be established to improve the odds of running a successful project. The positive side of conducting this interview to the entire team is that it impacts the morale of the team, project manager, and customer.

You can identify the real needs, requirements, and goals of the project.
Interviews allow the project team to create a plan based on the real needs and goals as presented by the customer. Identifying the actual goals of the customer allows you the opportunity to base your plan on foundational standards which are in alignment and will ultimately be measured by the customer. In many projects, it is difficult to understand exactly how the customer is measuring success. Only after you have identified the real needs, requirements and goals of the project based on the customer's interview will you know the exact measuring stick to be used.

What will surprise you sometimes in trying to understand the needs, requirements and goals of the project is that many times your customer has a different view of those goals and sometimes has trouble articulating them. These goals must be fleshed out and understood completely by the project manager and the team. To do this effectively, you must ask questions that will provide you the needed details.

You can determine the steps of action to fulfill the requirements.
Determining the steps of action means the project team will design a plan based on the information which has been accumulated from the customer. After collecting this information, you will analyze it and create actual deliverables.

The key word here is the emphasis on analysis based upon the interview. Many times, the customer does not have the proper language or knowledge base to inform us what he or she really wants. He or she can tell us outcomes; however, they are limited in being able to inform us of the internal workings to reach those outcomes. For example, a customer might tell the information technology (IT) department that a certain website should act in a particular manner, but the customer does not have the knowledge and expertise to explain how to do this. This means the IT professional conducting the interview is to take the simple language provided by the customer and interpret it into technical language and drivers to fulfill the customer's desires. Many project teams forget this portion of analysis and expect the customer to detail all the outcomes of the project and what is desired, completely preventing the team from any need of analysis. This is not realistic today! The reason a project team is together is because they have a strong expertise in a particular area, which is needed to analyze the situation.

You can know ahead of time the real measurements of success.
How the customer determines success in a project is important. Too many project teams play the guessing game on measuring the success of a project. Sometimes, in a seminar, people have laughingly told the story of how a project was completed, which met all the criteria as specified; however, it did not work. These kinds of interpretations of the success of a project become very frustrating to both the customer and the project team. On other occasions, project teams have indicated they really did not want to know the real measuring stick of the success of a project.

They basically felt they knew more than the customer concerning how to measure success, and they would deliver what they thought was best. This is of great concern in the project management field because more people want to deliver to the customer what they have determined to be successful, rather than allowing the customer to judge success. Unless the customer and the project team are working to come up with a joint measurement of success, there will always be the impression that the project missed something and did not function as desired.

You can gain real help from your team in reaching the goals faster.
When you need to speed up the project or move the project decision along faster, you can gain a great deal of internal expertise and know-how from your project team. Today, the greatest knowledge can be delivered from the front-line worker who does a job over and over again. Although, this can only take place if all information, goals, and data have been given and explained, and the communication is open. This is difficult in some projects due to classifications or secrecy policies that affect what some team members can know about a circumstance.

You can prioritize the important requirements for better tracking.
Prioritizing the most important requirements of a project is very important, especially as a measurement of success. When working on a project it is vital to understand how each requirement is prioritized in the mind of the customer. This understanding allows each team member to realize that, in case of a crisis, some requirements will have less impact on the customer and which might have the capability of being changed.

When focusing on tracking throughout the project, it is very important to make sure that the measurement is clear, concise, and represents real progress on the project. An example of what not to do is to only track a measurement because you have the capability of tracking it regardless of whether it gives you any real benefit in showing performance or status on the project.

You can increase your chance of success by knowing all the goals and requirements up front.
The last benefit, which really influences the need to do a thorough interview with the client, is that you will know all your goals and requirements early. This allows you the capability of being able to make adjustments on the front end of the project, and you will be able to move it toward completion in a faster, more cohesive manner.

Customer Interview Funnel

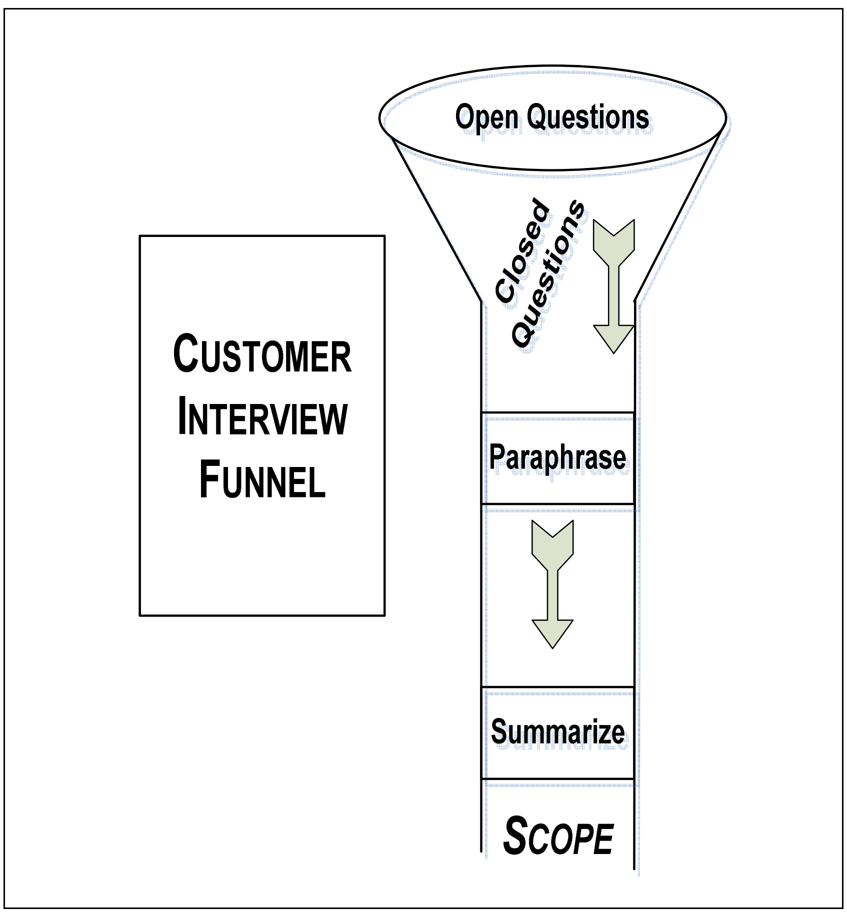
The customer interview funnel shows the process used in gaining the needed information from the customer. This process points out how to use open questions, closed questions, paraphrase and summary for detailing the project scope.

You will notice that the interviewing process will begin with open questions designed to gather the needed information from the customer. As you are asking open questions and begin determining the requirements of the project, you then move into asking closed questions to verify your understanding. As you continue through the funnel, understanding and receiving more details about the project, periodically paraphrase your findings to the customer. Paraphrasing allows you to give an overview of how you understand the needs of the project.

After you have paraphrased the requirements back to the customer and they have verified that you are on target, enter back into asking open questions to determine the next requirement of the project, and then follow with closed questions and paraphrase. You will conduct this process over and over again until all the requirements of the project are detailed, concise, and clearly understood by you and your project team.

The last stage of the customer interview funnel revolves around a summary process. The summary is the last component in the requirements gathering interview in which you will verbalize an overview of every requirement specified by the client. The summary is a bullet point of each requirement. It is in this category that the customer has the last chance of making any corrections to that which you will be working. Understanding and consistently using the interview funnel as a matter of being able to guide your customers from open questions to a summary of requirements can be very beneficial and can yield solid details for requirements.

The graphic below demonstrates how to go through the customer interview process.



Requirements Interview Process

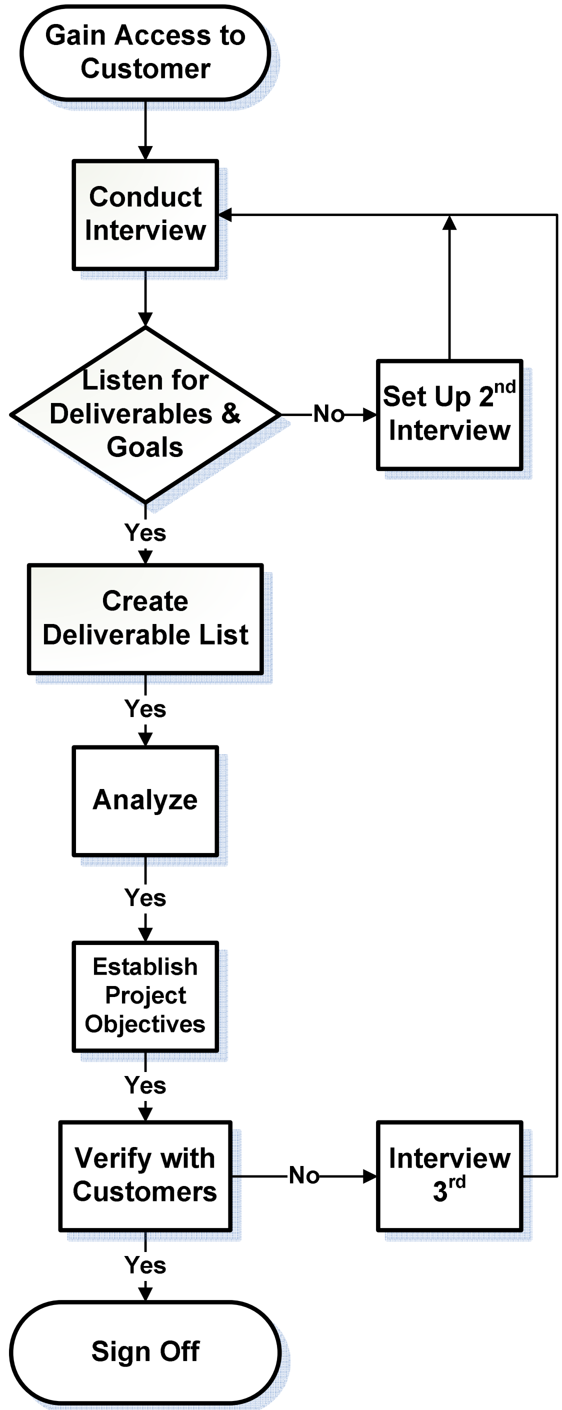
The requirements interview process gives an overview of the process needed to gather details concerning your project. You will notice that this process gives you several options for repeating the interview both for verification and for additional clarification.

The requirements interview process can be done in one setting or in multiple stages, as needed for gathering the right information on this project. It is important to remember while going through this process that the goal is to get the right information so that the scope is defined correctly, and the project can be measured for success based on that scope. It is for this reason you will notice several iterations that will allow you the opportunity to revisit the customer and clarify the desired outcome. Sometimes it is thought that if you have to return to discuss requirements with the customer more than once, it is a sign you are incompetent or lack listening skills. That should be the furthest thing from one's mind! Going back to make sure you are clear on a project should reassure the customer your goal is to meet the objectives and to please him or her with all project outcomes.

Lastly, do not hesitate to take your findings and detailed documents back to the customer for approval before you invest a great deal of time in planning and assigning resources to something that might not be true. As you utilize this process, and as your team becomes more comfortable with it, you will be amazed with how clear the requirements will become and with the relationship that will be built with the customer.

Examine the process below and notice how each section will follow throughout a detailed step-by-step sequence. Each section allows you to gather more information while examining it for validity with the customer.

Requirements Interview Process



Steps to Conducting Structured Interviews

Sometimes conducting an interview is extremely difficult because the customer has not been educated in this process and has no knowledge or understanding as to why this should happen. It is for this reason that, at times, a series of meetings, and possibly management intervention, is needed to help educate the customer on the new process and the reasons why your projects will be including this level of interview.

Lay the proper foundation
Laying the proper foundation with the customer is extremely important in making sure the goals of these meetings are thoroughly met. You must explain in detail that conducting the interview is part of guaranteeing the success of the project. One way of reinforcing this foundation is to make sure you come prepared with a list of questions so that it does not appear you are trying to run these meetings with little or no planning.

Sometimes taking a few moments to explain the overall process of how a project plan is put together, as well as the capability of reaching those goals, is more than enough to convince the customer of the benefits of being involved.

Make this event relaxed
The customer interview is not the time to be combative or argumentative. You are only to understand the customer's goals. This meeting is for building a good relationship with strong communication skills for the purpose of gathering data and information. If this meeting is combative, the customer will not continue to meet with you throughout the project.

During these meetings, you are attempting to set an atmosphere that is very comfortable and relaxed but formal enough to appear as an orderly process that is structured for gathering the right information from the customer. If these meetings come across in any other manner, it will appear unproductive to the customer.

Take notes and document comments
Taking notes throughout this meeting is not only nice to do, but it is necessary for convincing the customer of the seriousness and importance of this meeting. In some cases, when projects have a strong commonality, it is appropriate to develop a requirements interview template which would contain a listing of the most common questions you should ask. These questions should be detailed for the purpose of gathering the breadth of the scope as early as possible in the process. Using a template or form once again reinforces the seriousness of this meeting. Throughout the interview, you should listen intently for words or phrases the customer repeats. Those phrases and comments need to be detailed and documented, as well as questioned, to make sure you understand what the customer is verbalizing.

Be supportive
Being supportive during the interview process means making comments which allow the customer to know you understand where he or she is going. This may include many things as simple as facial expressions, nodding your head, and asking clarifying questions to allow the customer the ability to know you understand what he or she is telling us about the project.

Get detail, detail, detail
Asking and probing for the real meaning behind each comment is imperative to conducting a great interview. What you are trying to gain from the customer are the precise details of the project, how it should function, and what the goals are with this project.

You can see that the interview should not be something that is fast-paced and hurried. It should gather a great deal of information and allow you to be able to view the project through the eyes of the customer. After the requirements interview, you should be able to concisely detail to your team all of the above information. Your team now has the greatest chance of being able to successfully complete the project and reach these measurable goals.

Gain Customer Interaction By Using Questions

The types of questions and how they are used are very important in the interviewing process. Many times, the project manager and team will have a tendency to make declarative statements concerning the project rather than ask the correct combination of questions needed to pull this information out of the customer.

Asking questions allows the customer to be part of this interaction. This means that the customer has the capability of being able to verbally direct you in what the project should achieve. It is through this verbal interaction that the customer has the capability of being able to explain what is to be done and why. It is not uncommon after the interviews for both the project manager and project team to understand a whole different level of project requirements.

There are three benefits that take place during the interview process.

1. Questions allow for emotional and psychological bonding
During the questioning of the customer, there is an exchange of emotional and psychological bonding between the customer and the project team. This bonding is extremely important to the outcomes desired in putting this project together. As a customer bonds with the project team, they feel more comfortable and give more details and specifications on how he or she desires for the project to function.

2. Questions build rapport and empathy
The second principle that is learned is that questions build rapport and empathy. The rapport between the project team and the customer is needed for guiding the project toward success. In addition, empathy is built between the project team and the customer who allows them to work in a mutual manner rather than in a competitive nature.

3. Questions move the customer toward a more clear decision
Interviewing the customer also assists in clarifying decisions and direction for the project. There are times with many customers where they only have a skeleton of what needs to be accomplished with the project. This skeleton has a tendency to spread out or evolve over time, which could creep the scope of the project or cause needless changes. Asking the right kind of questions can surface these specifics earlier in the process and allow the project team more time

to plan. In addition, it also allows the customer the opportunity to think through some of these hard questions prior to spending large dollars and having to make changes, which could cost more and impact time calculations.

Asking the Questions

Two of the most fundamental types of questions that are used throughout the interview process are open and closed questions. As an interviewer gathers information, he or she will switch between these two types of formats to detail a better understanding of what the customer is seeking to achieve.

Open ended questions
Open ended questions cannot be answered by yes, no, or one word answers. The value of using open ended questions is it allows the customer the opportunities to speak and tell you anything he or she desires about the problem being faced and the project which will solve it. Examples of open ended questions are:

- Describe the process you used.
- What solutions did you try?

Close ended questions
Close ended questions are direct and clear up details and anchor decisions. When using closed questions, you will notice they are much more precise, and they allow you to nail the customer down on something you do not understand. You can be very specific in making sure you understand what the customer wants. Examples of closed questions are:

- Is this something you can live with as a team?
- Are these objectives realistic?

It is clear that questions allowed the customer the opportunity to give the project manager and project team feedback. The strength of asking questions is so the customer will use his or her own words and work through the process mentally prior to the project team investing large dollars or being forced to make changes due to incorrect project objectives.

Drill Down Questions

While asking questions of the customer and the different experts involved, the interviewer must make sure he or she is prepared for the interview - not only with the standard questions, but with drill down questions. Drill down questions are additional questions that can be asked of the customer in a follow-up manner based on their answer.

There are two principles which must be remembered when asking drill down questions. By utilizing these principles, you will be surprised how much additional detail will be gained from the customer, and your understanding of the requirements will be more specific and obtainable.

Each question you create should have three or four follow-up questions for gaining information and clarity.
To have three or four follow-up questions to discuss with your customer shows the amount of planning you have put into trying to gather the requirements. This sets the tone and allows the customer to understand you are running the project based on thorough documentation. Having additional follow-up questions also prevents you from stammering around wondering what to ask next.

Drill down your questions until both the customer and the interviewer has a solid understanding of all requirements.
The question arises from people as to how far and how many questions should one ask. This is always dependent upon your understanding of the project and your relationship with the customer. For example, if I am conducting an interview with a customer for whom I have done three other projects, there is a lot of information I already know. However, if I am working with a customer for the first time, it is very unlikely that I have this kind of relationship or this background knowledge, so I am forced to interview the customer with more details.

It is clear that drill down questions show the customer you are prepared and will give you the needed information and data.

Model of Interview Questions

Let's look at some model questions that will help organize your interview and give you numerous options for being able to ask the customer the right question at the right time. These areas are only a suggestion, and it is possible that only a portion of these will be used during a customer interview. There is no reason for you to assume you must use every question in every interview. It is not realistic to think you must go through all the questions or use them in a particular sequence. Interviewing a customer is customized to the customer, his or her communication style, and how open he or she is to this interview. There are times you will return to some of these model questions and ask them all differently to see whether or not the customer is giving the exact same answer.

The important thing to remember while using these questions is that they are a model. The goal is to understand exactly what the customer desires from this project before you leave.

There are five different model question groups which will assist you in being able to gather requirements and design questions to ascertain the correct information at the right time from the customer. Each model group can have multiple questions. Remember that during the interview process, it is not necessary to use every model group to gain information. These are only given as a possible resource so you have the capability of asking a variety of questions to gather the much needed specifics of the project.

Data Questions
Data questions are designed to give you the specific data that is needed to drive the project forward. In many cases, the data you are gathering could be historical information of similar past projects. In addition, the data you are seeking may be analysis information that the customer has already conducted prior to making a decision to do this project. This information will help to minimize your analysis time, as well as look for gaps in what the customer has already examined.

The two questions below are examples of open-ended questions to get your customer talking and to give you some of the background information that will help to gather deeper data about your upcoming project.

—What kind of data and reports will need to be produced?

—Describe how your process uses the data now?

Best/Least Questions
Best and least questions are designed to allow you to see the extremes in the customer's thinking. Best and least opens up the capability of being able to allow your customer to measure verbally highlights of what they want in their project compared to areas they think should not be there.

In addition, these questions allow you to have an insight into what and how the customer is measuring success. It is possible, without best and least questions, to present a project back to the customer and have him or her evaluate it as a failure due to the fact that you have included information or created an unwanted situation. Best and least questions allow you to know about the potential parameters prior to starting or even completing the project.

The following are examples of best and least questions.

—What is the best thing about your past service provider?

—What do you like least about your provider?

Defining Pain Questions
Pain questions are designed to allow the customer the opportunity for sharing his or her challenges. It is during this section of questioning that you are able to define the highest frustrations of your customer, which is probably going to have a powerful impact on the project. You want to make sure you listen very intently to the hurdles the customer has faced with this project and what is to be solved. Pain questions are the questions most likely missed in an interview. It is not uncommon for project managers to gather proper data, budget, and high-level details on the project, but miss the pain questions. In many cases, the customer is going to look at the project through the eyes of past pain.

Pain questions allow you to see a performance, a system, or a personnel issue that has caused pain in the past. You must thoroughly understand what has brought the customer pain, or it is possible you will misdiagnose the solution for this project and provide the customer something he or she will never use and for which there is no intention of paying. Below are sample pain questions.

- What kind of productivity do you feel you are receiving from your employees?
- Are you facing these challenges now?
- Detail the amount.
- Can you give me some examples?
- What would be good for me to know?

Situation Questions
Situation questions allow you an opportunity to give a scenario as an example to your customer and ask for feedback. Situation questions can be used with any circumstance to make sure you have correctly understood the customer and vice versa. For example, you can say Mr. Customer, "If your project was able to do this function in a way that pleases you, would you look at it as a success?" This allows you to get the customer looking at the project from a situation approach and to understand how he or she will evaluate it.

Below are samples of situation questions.

- Explain to me how this is being accomplished today.
- In the present process, how is this handled?
- "What if" questions can be a very impactive way of confirming the customer's statements.
- What if this happens?
- What if we tried to do this?
- What if we gave you this and this?

Block Model

The block model is a second method to assist you in being able to organize your interview process. Below, you will notice there are three categories on the left-hand side of the model as well as three across the top. This model allows you the capability to plan your interview experience with questions that will fit each of the components.

The three sections across the top are investigate, diagnose, and confirm. Each section allows you the opportunity to investigate what the customer wants to diagnose - the real hurt, pain or solution desired by the customer - and confirm that your solution and understanding is on target with the customer's desires.

The three categories on the left are paraphrase, closed, and open. These sections allow you the opportunity to create various questions in which to explore all aspects of the model for gathering requirements from the customer.

It is clear that by using the block model, an interviewer can be prepared with various questions that will allow the project team to better understand the requirements and goals of the project in a shorter period of time.

Block Model

	Investigate	Diagnose	Confirm
Open	1	4	7
Closed	2	5	8
Paraphrase	3	6	9

Sample Questions To Ask Clients

–Explain some of the particular characteristics of the organization's culture.
–Who are the main stakeholders or players in the project?
–Detail the internal politics surrounding this project.
–Are there any hidden issues or agendas that would be good to know about?
–Are there any major areas of resistance that could hinder or defeat the project?
–Who can help motivate or drive this project?
–When this project is completed, describe what it should look like or how it should function.
–Once the project is underway, what type of reporting schedule would you prefer?
–Who analyzed and set the timetable?
–Do you feel the time schedule is realistic and doable with the present resources?
–If we discern the timetable or budget is severely off, how do you want us to handle it?

Diagnosis Doesn't Only Take Requirements

In this section we discuss diagnosing the problem rather than just taking requirements. We focus on the idea of looking at the bigger picture of what the customer wants to accomplish. This means that we fight the urge to just make a deliverables list based on the requirements which the customer knows. We are attempting to go the extra mile in trying to determine what the overlying goals are and why this project has surfaced.

During the interview process, it is very frustrating to see the interviewer only function as an order taker - not looking at the real goal of the project. An order taker can be defined as someone who interviews the customer and makes a basic requirements list with little or no analysis. As you can see, this could hurt the project long-term and miss the mark as to the real goal desired by the customer.

It is not uncommon for a customer to use certain terms and acronyms, thinking they are communicating to the project team or project manager, only to be misusing those same words. It is due to this that the interviewer must be very skilled at deciphering what the customer really wants.

As the interviewer gets more comfortable diagnosing, it allows him or her to move away from becoming an order taker. Diagnosing is more than conducting a basic interview; it is going the extra mile in looking at the strategic objectives in what the project will accomplish long-term. When an interviewer is in the diagnosing mode, the questions are more precise and pointed. This also leads to a happier customer when the project is finished.

Benefits of Diagnosing Project Requirements

The benefits of diagnosing project requirements have a powerful effect on the entire project. As we look at the next three benefits, it will be clear why project interviewers must go the extra mile to make sure they understand what the project is to accomplish and why.

Requirements are clear and concise.
Making sure the requirements are clear and concise is the reason why the interview process was created. When an interview is complete, the project team should walk away with a clear understanding of the goals for this project with almost no ambiguity.

Project scope is understandable and frozen for progress.
Freezing the scope for the project makes a difference in the entire planning process and the allocation of resources. Freezing the scope is defined as the detailing of the parameters or the scope of the project. In addition, may be the specifications help keep everyone focused on the project goal.

There are many instances in which a terrible interview contributed to a project plan being created, but the scope was not frozen. When this happens, the project is very vulnerable to scope creep throughout its duration.

Additional requirements for success can be added.
As you diagnose a project during the interview process, it allows the project team and the experts to add additional requirements that might not be known by the customer. These requirements allow the project to be successful and might be part of the undercarriage and support to accomplish the stated goals.

You can see the importance of diagnosing the unspoken requests of a project while making sure you understand them in detail.

Guidelines To Communicate Recommendations Effectively

Making recommendations to the customer seems to be part of the normal interviewing process. This comes about due to the fact that customers have not finalized all of their plans for a project when you began interviewing. In many cases, they are looking for someone to assist them in developing their ideas. It is not uncommon to make recommendations to the customer as a matter of guiding them toward a more detailed explanation of the scope of the project they are seeking.

The following guidelines will assist you in being able to make recommendations to your customer in a more effective manner.

Discuss and present one idea at a time.
When making recommendations to your customer, it is important that you do not overwhelm them with numerous topics at once. The more topics the customers have to think through or decide upon, the higher the possibility they will get confused and will make no decision at all. To reduce this from happening, it is better to present one idea at a time in a manner that leads your customer toward a decision.

Get confirmation on each point before you move forward.
After you have discussed each idea, it is important to get some type of confirmation from your customer before you move to the next. This confirmation can come verbally, in writing, or, as a last resort, body language. One of the things you will notice when making recommendations is that the customer will give you cues which will show you they understand your point and idea.

Be specific with your recommendations.
Some interviewers think their role should be one which does not guide the customer in any direction, but allows the customer the opportunity to always have control. This makes sense in many situations; however, when interviewing a customer, it is possible they do not know what direction they are headed.

To effectively deal with this, the interviewer should make a specific recommendation to the customer based on their experience and understanding of the project requirements. The interviewer should remember that a specific recommendation is stronger than one which possesses a great deal of ambiguity. The specifics of the recommendation allow the customer to accept or reject what the interviewer is saying. This decision allows both the customer and the interviewer to go in a new direction without any misunderstandings.

Be prepared for any questions.
Questions from the customer are common when making recommendations. Some interviewers become extremely concerned due to the enormous amount of questions that a customer will fire back at a recommendation. It is good to remember that when a customer is asking questions, they do not normally do this with the intent of disagreeing, but they are only asking for more information.

Create notes on what you want to say and recommend.
Recommendations should not be something that is just off the top of an interviewer's head. It should be very strategic in manner and should be something that is well thought out and detailed. To make sure your recommendation is clear and specific, it is beneficial for the interviewer to write down the exact recommendation.

Keep the meeting logical or chronological to assist in understanding.
Keeping the meeting logical and chronological will make the difference on whether or not the customer understands the full depth of your recommendation. There are many individuals who cannot grasp a recommendation unless they see it in sequence as it relates to the project.

Keep all terms and language as simple as possible.
When making recommendations, keep your terms and language as simple as possible. This is not a time to show off with hundred dollar words or acronyms which the customer does not understand. Your goal is to make sure that the customer understands what you are recommending and why in the simplest format.

Be a good listener to all customer comments.
As you interact with the customer during the recommendations, make sure you listen to the exact comments the customer is making. You are trying to determine if the customer fully understands the recommendation and why it should be considered, as well as if there are any objections. The interviewer must make sure to listen to the customer and analyze what is being said prior to making additional comments.

As you can see, it is very important for the modern project team to go the extra mile and interview the customer. Unless a detailed interview is accomplished prior to planning, it is almost impossible for a project team to meet the requirements demanded by the customer.

The interview process should be structured and precise in gathering the information, goals, and success factors of the project. When this is done correctly, the details and clarity of the project are focused, and the project team is now ready to plan the project in detail.