

How to Develop a Project Design

Introduction

This is a set of guidelines that students should adapt and customize for each client. There will be variation depending on the student's relationship with the client, the nature of the client organization, the type of project, and so forth. However, the general points, like listening to the client, are always essential.

These guidelines are based on the assumption that the student has one or more face-to-face meetings with the potential client before submitting a written proposal. In this situation, many of the issues and parameters around a project are worked out during the face-to-face interaction. Some students may follow a different process; they should adapt the guidelines to fit their situation.

When meeting with a potential client to discuss a possible project, the student will usually need to address three aspects of the project. She or he will need to:

1. Develop a framework for the issue
2. Outline a research plan
3. Identify deliverables

Each of these is described below.

1. Develop a Framework for the Issue

Listen to the Client's Needs

Listen carefully to the client's needs in meetings with the client, and analyze the needs expressed in any written information you receive (such as a Request for Proposal). Reflect these needs back to the client. Make sure that you understand their issues. Explore the background to these needs and the client's motivation to address this issue now.

Situate the Issue in its Cultural Context

Reframe the client's needs as an issue you are ideally equipped to address, by situating it in its broader context (cultural, social, historical, economic, political...). Clients often conceive of their problem narrowly. As anthropologists, we can develop more powerful solutions by opening up the issue and exploring how it fits within a larger domain.

You should actively try to figure out these contexts when you talk to a potential client. You can ask the client questions to test your ideas. At some point in the meeting, you should offer your new, innovative framework for looking at the issue.

The Cool Factor

When you offer a framework for understanding the client's problem, your goal is to get the client to think, "wow, this project could provide me with really innovative ideas! I hadn't thought of looking at the situation that way before, but the framework makes a lot of sense!"

Of course, you don't want the client to think, "this person is way out there, they have no idea what they're talking about!" So you need to monitor the reactions of the client closely while you are presenting ideas. Be flexible. Remember, they are the expert. But try to guide them gently to new ways of looking at their problem. Encourage their enthusiasm by modeling it (i.e. displaying enthusiasm yourself).

You should never underestimate the power of coolness. Ethnographic methods have a high cool factor in many organizations; they promise a unique kind of information that cannot be obtained by more traditional methods.

2. Outline a Research Plan

While you are talking to the client about their issues, you should be mentally roughing out some initial ideas about the way you might conduct research. Share these ideas with the client. You can always modify your suggestions later, but roughing out a plan right away is valuable because it helps the client understand how you might approach the problem, and shows that you are a quick thinker and competent in your area of expertise.

In order to develop an outline of what your research might look like, you need to consider the following elements:

- What **issues** have you and the client agreed that you should explore?
- How much **time** can you dedicate to this project? How many hours a week, for how many weeks? This constrains the amount of research you can promise to do – how many interviews, how many hours for analysis, and so forth.
- What **resources** can you obtain from the client? Access to people, travel funds, survey administration, etc.?
- In terms of **data collection**...
 - What kinds of people would be most useful as research **participants**? Users of a product or service? Employees of an organization? What would be a reasonable demographic breakdown? Your client will be able to provide guidance here.
 - In what **contexts** would data collection be most useful? For instance, where could you observe relevant cultural practices? This is an area where you should try to think broadly and creatively.
 - What **methods** can best illuminate the issues you will explore? Pick and choose from your toolbox of ethnographic methods, which includes
 - Participant observation

- In-depth interviews
 - Intercept interviews (getting a quick 5 minutes from someone that you approach in a store, on the street, etc.)
 - Shadowing (following people around for a day or as they engage in particular activities)
 - Video recording any of the above
 - Surveys
 - Etc.
- How much time do you estimate you will need for **analysis**?

In talking over your ideas with the client, you can modify your plan according to questions they may raise. Later, when you prepare a written proposal, you will have a good idea of what your client is likely to approve.

3. Identify Deliverables

Discuss with the client what kinds of deliverables they would like, i.e., what will you deliver to them at the end of the research process. The *contents* should follow from your discussion of the client's issues and the research plan you have outlined; for instance, you might say that you will summarize the results of the interviews you agreed to conduct on topic X. The *forms* of the deliverables might include one or more of the following: a written report; a verbal presentation; a video; a series of interactive meetings with members of the client organization; a website; a training program; or a manual. Ask the client what would be most useful to them. Try to be accommodating but don't agree to an unreasonable amount of work.

Notes on Managing Interactions with a Client

As you read in Peter Block's material, you should think about your work with the client as a collaboration. Your deliverables will only be used in the client organization if they are promoted by the person you are working with. So you should always focus on building your contact's engagement with the project and commitment to it.

Always respect the client's expertise. Remember that the client has more information than you do about their problem, their organization, and their field of work.

Clients are motivated by their desire to succeed in their career. They evaluate a potential project in terms of how it might reflect on them. Be sensitive to this and show them how your project can be a source of symbolic capital for them.

You should project enthusiasm for what you do, a high energy level, confidence, and an awareness that you are offering something unusual and valuable. A sense of humor is always good so long as you don't offend the client.

You should always listen closely to a client and show them that you heard what they said. No one likes arrogant outsiders who don't listen and seem to think they have all the answers.