

Consultant's interview-style check list

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This check list has been prepared to help students focus their review of videotapes of consulting sessions. Please use it as guidance; don't be afraid to discuss issues not found on this list; and please suggest improvements to this check list.

After viewing a videotape, discuss issues such as these and point to portions of the tape that support your statements.

Preparation

Has each party done his/her homework before the meeting?

Did the statistician seem to have a reasonable level of general statistical expertise? In the statistical area needed by the problem?

Did the client seem to have a reasonable level of expertise in the subject matter? In the statistics needed by the problem?

Had the statistician done any homework for this session, either learning more about the clients problem or about the type of statistics expected to be needed? Did the amount of homework seem appropriate? I.e., was it too little, or excessive?

Getting started

Was the client made to feel reasonably comfortable?

Was the agenda for the meeting clear from the context? If not, was it made clear early on?

If it was clear from the context, was time wasted going through the formalities of setting an agenda?

Goals of the project

Was the central goal of the project made crystal clear? Were secondary goals probed? Was the general context of the goal made clear? (I.e., if the question was answered, what then?)

Was the way in which the data were to be quantified, with respect to the goal, made clear?

Were the boundary conditions made clear? I.e., what sorts of data could not be gathered? What sorts of procedures were ruled out a priori? What things were possible, but very difficult? Did these constraints seem reasonable given the situation?

Was the consultant of any help in goal clarification?

Was the consultant able to ask probing questions in a reasonably diplomatic way?

Relative status of participants

Was the discussion one between equals or was one party clearly the "parent" and the other the "child"?

Was the level of discussion such that both parties could understand most of what was going on, or was one overwhelmed? Put another way, to what extent did the over use of jargon or unnecessarily complex details or approaches get in the way?

To what extent did anger, fear, exasperation, shame, shyness, etc., etc. interfere with the success of the meeting?

Did the client and statistician seem to emerge as collaborators in this enterprise?

Interaction between consultant and client

Was the consultant a good listener? Did the consultant make good use of "play back" techniques, such as "Let me see if I understand things up to this point,..."?

Did the consultant help the client focus on the important issues?

Did the consultant offer tentative proposals to get the client's reaction?

Was the consultant an effective speaker when the occasion warranted?

Did the consultant appear to be clean and reasonably neat? (Clean teeth and general lack of body odor are necessary, at least in this country.) Was the consultant dressed appropriately? (Suits are "necessary" in some contexts and out of order in others.)

Science of problem

To what extent did the client get new insight into his/her own problem from the consultation? Or was most of the discussion centered on statistical techniques?

What is your opinion of the overall quality of the "science" being done in this project?

Did the statistician dig into the problem deep enough to get an adequate understanding of the statistical requirements.

Statistical approach

Was a statistical approach chosen?

If so, was the chosen approach clearly a good one, or is there some doubt in your mind as to whether it was appropriate to this problem?

If not, was it clear why an approach was not selected? Was the effectiveness of the meeting clearly diminished by the failure to choose a statistical approach?

Did the statistician make effective use of the client's expertise and intuition as to how the data should be collected or analyzed?

To what extent did the client come away with a better understanding of appropriate statistical methodology? I.e., to what extent was this session an effective learning experience for the client.

Was the level of the statistical procedure appropriate to the task? To the clients capabilities? To the time budget for the project? Could a simpler approach have been tried?

Was sufficient emphasis put on graphical and exploratory analysis?

What next

Was it crystal clear what each party had responsibility for doing next?

If a solution was not readily at hand, was it reasonably clear how progress would be made toward an ultimate solution?

Was the time frame of the project made clear? Were any deadlines imposed? Did they seem reasonable?

Budgets

Was the amount of effort the statistician was to spend on the project made clear? Was it clear that the client thought that was a reasonable amount of effort given the importance of the project?

Rewards

Was there any discussion as to how the statistician was to be given credit for his work? Should there have been?

Interferences

Did either party stray undesirably from the central theme of the discussion?
Did bureaucratic or other details get in the way unnecessarily?

Overall

Did the time of both parties seem to have been well spent?
Did the pace of the session seem about right, or was one party too slow or too fast for the other?
Did the session seem rushed or too low key?
Did the client seem reasonably pleased with the session?
Did the consultant seem reasonably pleased with the session?
What was your overall impression of the meeting?