General Guidelines for Capstones

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1 Be Professional

In working with the client, you'll be representing Maxwell and the MPA Program. In working with third-party contacts on behalf of the client, you'll be representing the client as well. Treat all interactions with anyone other than me as professional consulting and follow the guidelines below.

Professional attire is required for face-to-face meetings or video-based teleconferences. If you're not sure exactly what that means, check with me or Google "professional dress code". Roughly speaking, it means a jacket and tie for men and equivalently formal attire for women.

Written documents should be clear, concise and free of grammar or spelling errors. For documents longer than a brief email, it's a good idea to have someone in the group other than the author read over the document before it goes out.

PowerPoints or other presentations should be clear, formatted well, and should avoid excessive text. The point of the file is to accompany the verbal presentation, not to replace it. It should illustrate the talk: think "show" rather "say" when you're putting it together.

2 Single Point of Contact

Avoid having multiple people on the team contact any given outsider. That is, if team member Alice contacts outside person Bob, all subsequent communications to Bob should go through Alice if at all possible.

Start this approach right away with the client. Choose one person to be the single point of contact with the client and give the client that person's email address and phone number. If team member Carol is the contact, the client can then send any information, questions or requests to Carol without having to figure out which team member needs it. Also, all updates or requests from the team to the client should go through Carol.

Avoid copying team members on outgoing messages unless specific circumstances require it. There are a couple of reasons for that. First, it avoids causing the outsider to look through the CC list to figure out who's who. Second, the outsider might use "reply" rather than "reply all", which can cause confusion within the team about who saw the reply. However, this point applies to messages that originate with you: always respect the client's CC list: if the client copied people on the message, be sure to use "reply all".

3 Use Slack for Internal Messages

As much as possible, use Slack for messages within the team: it's much better than email for keeping large collaborative projects on track. In particular, in addition to messaging, it's a great way to file PDFs and other documents that you turn up in the course of the project, or to keep track of useful links. It will help a lot to annotate the files briefly when you store them. To make the most of Slack, consider setting up separate channels for different aspects of the project.

Finally, it’s OK to turn off notifications from Slack outside normal working hours. The goal is to keep the project organized, not to make everyone feel like they’re on duty 24/7.

4 Use a Cloud Service for Data Files

Set up a shared folder for the group on Dropbox or Google Drive. Keep everything there that isn’t kept in Slack. Not only will it make it easy to share files, it will also mean you are protected against losing any of your work if a hard drive crashes or a computer is stolen.

If your project involves large amounts of data (typical for capstones linked to the data analytics certificate) please use Google Drive via the account linked to your SU NetID. That way you’ll have essentially unlimited storage.

Finally, one thing to keep in mind that you probably won’t be able to prepare the final version of your report using Google Docs: to get the formatting, layout, references and illustrations right you’ll probably need to use Word or something equivalent. If you compose the draft using Google Docs be sure to allow time at the end to convert and polish it.