Pre-departure call to the Client

Set up the pre-departure call

- Research the company. Learn as much as possible about them.
- Pick someone on your team to be the Client's primary point of contact (POC). Consider making your best Spanish speaker (if you have one) the main point of contact. In any case, you will be facilitated by a translator.
- Assess the English speaking skills of your client. Sometimes they are listed in the project description. Ask Prof. Grazioli.
- It is generally a good idea to translate all communincations in Spanish. Use your favorite GenAI.
- The POC sends the Client a first email AND a WhatsApp. Explain that you are the UVA team of professionals assigned to them and are excited to begin the Project. The purpose of the initial call is to introduce the team and start scoping the Project beyond what you have learned so far.
- Attach the team bio.
- The POC identifies several possible times for the call to the Client. Usually, we schedule calls during Mendoza business hours. Most calls last 30-45 minutes. It is ok if not everyone on the team is on the call. It is more important that the call happens before departure.
- Indicate times in using Mendoza time. Mendoza is EST +2.
- Use Zoom or WhatsApp. Arrange in advance the exchange of the necessary connection information with all parties. Include Prof. Grazioli, your SAM guide (Augustina, Laura or Jose'), and the McIntire Coordinator (Maria Morrel) in the invite.
- Coordinate with David and José if you need help with translation during the call.
- Give all the people with whom you interact reasonable turnaround times.
- In all your interactions, remember **they are your clients** (i.e., they are not paid UVA staff).

Role of the 'Study Abroad Mendoza' (SAM) staff

- Each team will work with an individual from SAM. Their role is to be language translators as needed and overall facilitators, e.g., procuring resources and setting up meetings. While they may offer advice if asked, they are not faculty and are instructed not to direct you. *You* are in charge of your client engagement. You run calls and interviews.

Lead the pre-departure call

- The pre-departure teleconference aims to introduce the team to the Client, establish a cordial, professional relationship, set expectations about what you will deliver, and begin scoping the Project that will be the focus of your analysis.
- Do not expect the Client to know how to run the call, scope a project, or even clearly understand the project. This is new territory for many of them. It is your job to guide them through the process.
- Scoping a project is a process. You do not need to have the Project fully understood and nailed down by the end of the phone call. The goal is to understand the problem, NOT to begin delineating a solution.
- The POC runs the call. Somebody else in the team takes copious notes. Everybody on the team is engaged and participates, ensuring you do not overwhelm the client.
- Please keep in mind that your clients likely speak intermediate-level English. Adjust your conversation style accordingly. **Speak much more slowly** than you usually would. Enunciate. Slow down.
- Get somebody on your team to remind you to slow down when you forget because you will.
- Team members may use a chat during the call to exchange private comments unobtrusively.
- Do not fall back into an "I-am-just-a-student" attitude. You are there to help a client. This is your consulting engagement. Own it.
- The call is successful if you feel that you have established an initial cordial relationship, set some tentative expectations about what you might be able to deliver, and agreed on a few next steps. For instance, the Client might send you additional materials to look at before departure.
- If feasible and needed, plan for a second pre-departure call.

Suggested call content

- Thank the Client warmly and reiterate your excitement about the Project.
- Introduce your team, identifying who is on the call and who cannot make it. Slow down as you say your names.
- Figure out who is on the call on the client side: names and roles. Write them down.
- Include a little chat to establish rapport. You are excited to visit Mendoza and their company. Find something positive to say about the company or the city.
- Scoping can be initiated by asking the contacts to briefly talk about (1) the company, (2) the Project, and (3) the goals and deliverables from your engagement so that some initial expectations are set.
- Do not assume that the Clients know what the project is. They might have been briefed by somebody else, or they might have agreed to it weeks before. Summarize your understanding of it and ask for confirmation. It is ok if they veer off a bit from the initial description you saw.

- Make sure that you begin to understand the Project, what problem it solves, and for whom. Do not be afraid to ask several "why?" questions.
- What would be a definition of success for the project and your engagement? Do not press too hard at this stage. They might not know yet.
- If you feel like there are multiple projects, explore each one of them. Do not try to choose which one you will tackle at this stage.
- Stay broad; avoid rabbit holes and minute details. This is big-picture time!
- Use active listening: summarize to the Client what the Client just told you to verify your understanding. Please do not abuse this technique, though: it can be annoying.
- Do not hesitate to request information and data. Ask if data is available, can be prepped, or can be sent to you. If they refuse, back down, at least at this point.
- If they try to describe a future problem and get you to solve it, try to gently explain that the nature of your engagement is to examine an existing project and to offer recommendations for the future based on your observations.
- Make sure that you agree on a few next steps.
- Thank the Client warmly and reiterate your excitement about the Project.

After the call, report your progress to Prof. Grazioli and your Student Abroad Mendoza (SAM) lead. This does not have to be a formal email. Brief and informal is fine.