



ROBERT H. SMITH SCHOOL OF BUSINESS

Trace3 Meeting Assistant

Client: Trace3

TRACE3

Business Process Analysis Capstone Project Statement of Work

Team Members:

- Asheer Mogal
- Farah Bushra (primary POC)
- Harshil Patel (secondary POC)
- Niharika Gupta
- Pradyum Mohta
- Pranay Reddy Anthireddy
- Siddharth Khare

Document last edited on: 03-04-2024

Version Control: v0.1

Client and Industry Background

Trace3, founded in 2002, is a technology consulting company headquartered in Irvine, California, that provides IT strategy, solutions, and services to organizations around the globe. Trace3 has continued to work on delivering cutting-edge services to companies seeking to navigate the dynamic IT landscape and maintain a competitive edge.

With collaboration with top technology names like Cisco, Dell Technologies, and Microsoft, Trace3 has ensured it provides only the best-in-class solutions that are specifically tailored to their customers' needs. With a team of experienced consultants and engineers, Trace3 provides impactful solutions that drive growth and business value.

Problems, Opportunities, or Directives – Classified using Wetherbe's PIECES Framework

1. Performance: The as-is system at Trace3 is capable of time tracking and project management. However, they are in need of a tool that provides not only advanced reporting features but also integrates with Smartsheet. The tool must also include an AI-powered summarization of meetings & provide a project & meeting specific utilization report.
2. Information: Our team will require some data from Trace3's end that we can use to fetch APIs that directly fill the KPIs & metrics in our dashboard. This detail is yet to be discussed.
3. Economics: NA
4. Control & Security: Different sections of the tool will be accessible to SI team members, BAs & PMs.
5. Efficiency: This will be determined based on the UAT of the tool & the customer/user feedback.
6. Services: Discussed in detail in the project scope section (next).

Project Scope

The project will develop an effective meeting assistance tool tailored for Trace3's strategic initiative meetings. This tool integrates meeting progress tracking, categorizing time by project, and generating insightful reports and dashboards for management review. Enhanced features will include action item reporting, unanswered question tracking, due date reminders, and integration with project management tools. Please find some of the key features:

- **Utilization Report (%):** The tool will generate reports showing the meeting progress and personnel involvement, broken down by attendee, department, meeting, and project, offering comprehensive insights into resource utilization.
- **Meeting Analysis:** As a primary requirement from Trace3, the tool will focus on accurately generating reports for each strategic meeting.
- **Trace3 Pilot Project Integration:** The project will explore integration with Microsoft Co-pilot, considering it for enhancing features based on Trace3's requirements.
- **User Base:** The initial users of the system will include internal Strategic Initiatives (SI) team members, Project Managers (PMs), and Business Analysts (BAs), ensuring that the tool meets the specific needs of those directly involved in strategic project planning and execution.
- **Integration with Smartsheets:** The tool will be designed to integrate seamlessly with Smartsheets, allowing for the synchronization of meeting insights and action items with existing project management workflows.

Project Objective

To develop a proof-of-concept meeting assistance tool that improves resource allocation and project time management at Trace3. Success will be measured by the tool's adoption rate and feedback from users on its effectiveness in enhancing time management practices.

High-Level Requirements

1. The main task is to ensure that the tool is able to track the amount of time spent by an SI team member in a meeting project-wise, which can be analyzed based on different time-periods.
2. Development of the core meeting analysis and utilization reporting tool/dashboard using AI (possibly leveraging Copilot).
3. Integration capabilities with existing project management software - Smartsheet.
4. Excludes complete overhaul of existing time management systems.

Constraints

Client-side: Integration with existing meeting platforms and ensuring data privacy.

Team-side: Limited experience with integrating third-party APIs and tight project timeline.

Appendix:

Questions for Trace3:

1. Which part of the utilization report/dashboard/tool should be visible to the 3 types of users - Internal SI team members, PMs and BAs ?
2. What is the current tech stack, if any, that is being used by the Trace3 team for tracking the time spent by the SI team members ?
3. Should we come up with the list of KPIs & decide on the things to be displayed on the dashboard ?
4. What should be the source of the data / from where should the data be fed to be used as input for the dashboard ? Note that this data will be fetched in a recurring manner (periodically).
5. For Q4, is there any sample data that the Trace3 SI team can share with us?
6. What are the list of metrics or KPIs that Trace3 wishes to be shown in the utilization report dashboard? Our team can brainstorm on our end as well for this.