**Meeting Summary**

Recap important points of the business manager’s current situation, and desired future outcomes. Use business language in this section. Use business manager’s words where possible. Reference key dates if provided.

After our meeting we feel like we have a good grasp on what you want to accomplish to propel Tax Boss. You put a ton of emphasis on advertising to attract more customers. You also mentioned something that seemed to be very important to you which was being able to sensitive documents securely. You talked about wanting a notification/scheduling system or sorts to make it easier make appointments and to stay up to date on all your tasks. Another important want of yours was a better billing system to track time spent with employees and to make sure you were paid for your services. Overall, you like the way you do business currently but you would like to expand.

**Specific Business Requirements** These items represent what the business manager wants to accomplish. Again, use business language. Reference dates if the business manager provided date requirement/deadline for an item.

1. Advertising to draw in more clients.
2. Safe transfer of sensitive documents
3. Scheduling & notification system
4. Billing system to track time and payment

**Action Items**

|  |  |  |
| --- | --- | --- |
| **What** | **Person Responsible** | **Due Date** |
| Advertisement | Kincaid Young |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Solution Definition and Proposal Creation Milestones**

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Start Date** | **Completion Date** |
| Research customer relationship management solutions to support Acme’s sales forecasting needs |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| Project team prepare solution proposal presentation slides | 4/4/2022 | 4/15/2022 |
| Provide solution proposal presentation slides to Mrs. Jones | 4/16/2022 | 4/16/2022 |
| Present solution proposal to Mrs. Stephanie Jones | 4/19/2022 | 4/19/2022 |