**Meeting Summary**

Tax Boss is a company dedicated to helping clients with their taxes. The company is well set to perform this task but lacks the ability to easily and seamlessly grow its clientele. Mr. Austin, the owner of Tax Boss, laid out five main areas where he would like to see the company improve, with solutions provided by April 15, 2022.

Firstly, new clients need to become aware of Tax Boss and the services it provides. Clients are currently made aware of Tax Boss through word of mouth. This is too slow and is unlikely to grow into a large clientele.

Secondly, clients and Tax Boss need to be able to send one another documents containing sensitive information securely. These documents are currently being hand-delivered by the client. This is inconvenient for the client.

Thirdly, Tax Boss needs to be able to track the amount of time spent on a client and to bill the client quickly and easily for this time. Times are currently being tracked with a simple spreadsheet, and the bill is calculated afterward and sent to the client. This process should be more automated to reduce wasted time.

Fourthly, clients need to be able to schedule meetings with Tax Boss quickly and easily. Meetings are currently scheduled over the phone or via email. A more professional process would be preferred.

Finally, Mr. Austin would like a notification system alerting him to various tasks demanding his attention, such as scheduled meetings, the arrival of documents sent by clients, when bills are sent and paid, etc.

**Specific Business Requirements**

1. Faster spread of the knowledge of Tax Boss and its services to new clientele.
2. Secure transfer of sensitive documents between Tax Boss and its clientele.
3. An automated system to track time spent and bill clients for this time.
4. A system allowing clients to schedule meetings with Tax Boss.
5. A notification system alerting Tax Boss to upcoming events, such as meetings.

**Action Items**

|  |  |  |
| --- | --- | --- |
| **What** | **Person Responsible** | **Due Date** |
| Advertisement | Kincaid Young | 4/9 |
| Safe transfer of sensitive document | Shaun Bennett | 4/10 |
| Scheduling & notification systems | Dante | 4/10 |
| Billing system | Christian | 4/11 |

**Solution Definition and Proposal Creation Milestones**

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Start Date** | **Completion Date** |
| Research social media reach and local popular businesses to start forming advertisement strategies. | 4/3 | 4/9 |
| Research best services that allow for secure communication and plan on which to choose. | 4/04 | 4/10 |
| Research best software that allows for scheduling appointments and reminders for tasks | 4/4 | 4/10 |
| Research best invoicing software that will automate the billing process | 4/4 | 4/10 |
| Project team prepare solution proposal presentation slides | 4/4/2022 | 4/15/2022 |
| Provide solution proposal presentation slides to Mr. Austin | 4/16/2022 | 4/16/2022 |
| Present solution proposal to Mr. Austin | 4/19/2022 | 4/19/2022 |