**Client Meeting Minutes 1**

Date/time: Thursday 02/04/2020 - 15:00

Attendees: Alec, Kevin, Mahe, Ahmad, Xin, Xinhui, Raelene, Ziyan, Bing

**Discussion:**

* A high-level understanding of oneCRM: A digital transformation to bring all the data from each department to single platform, standardize and automate repeatable process where possible
* With the sales functions at Uni, BDMs have a list of workable opportunities, and they need to identify potential interests, approach and engage them, offer them the product, and take them through stages/process to come to an agreement - convert into ‘sales’
* There are three types, and we will be focusing on the last two.
  + Teaching and learning - students
  + **advancement – donors**
  + **Research engagement – industrial/research partners**

* Expected outcome: a working model to generate a probability score for BDMs to allocate their resources and prioritise engagements with clients – the score in system is currently generated manually
* Existing models:
  + Wealth screening model – SQL scripts, can contact Mahe for further details
  + Propensity score – used by advancement team, automated.
* To request data:
  + Research – Kevin
  + Advancements, donor – Mahe

**Actions**:

* Setting up Team (for data storage/files/group chat) – Alec
* Request sample data/system access – from Kevin & Mahe
* Setting up a catch up with Mahe for Wealth screening model – via Teams
* Setting up regular catch up every 3 weeks (preferably in the afternoon) – via Teams
* Having a list of hypotheses for key drivers/features before our next catch up and provide to Alec/Mahe/Kevin so BDM can be engaged for validation – via Teams

Researchers, max profit/revenue of university.

Matching algorithms problem (classical), match entities of first set and second set

Machine learning algorithms can be improved upon as well.

Ideally, researchers who has done project with the same company.

, or probability to access the success rate given the limitation of resources.

Set a problem statement: one opportunity, get the success rate, regardless of how many resources we have. Should we consider limitation of the resources.

How to allocate the resources so we can maximize revenue for the university.

How many projects has researches done successfully in the past, at level of the projects, or at level of the researches??

Project level is an aggregated form of researcher level.

Reminder to client on Monday.

\*\* Literature review

\*\* Search for similar datasets