Minutes of Meeting

Date and Time	25 September 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Ravinder • Akash • Rahul • Ajay • Gurpreet • Kapil • Pankaj
Attendees (Client Side)
• Tom, Teresa, Randy

Agenda
• **Discussions on the following:** ○ Admin Panel Phase 2 ○ KPI (Key Performance Indicators) ○ Admin Panel – Phase One Recap ○ Meeting Schedule Changes

The following things are discussed:

1. **Admin Panel Phase 2 Discussions:**
    a. **Planned Implementations:**
        i. Current onboarding requires manual developer intervention.
        ii. Proposed solution: Automate onboarding via Admin Panel.
            1. Client fills onboarding form: company name, branches, employees, selected plan.
            2. Admin creates plans with module selection.
            3. **Dependencies enforced** (e.g., scheduling requires HRM; auto-selection of dependent modules).
            4. DigitalOcean database clusters will auto-create based on company size/strength.
            5. Auto-billing and tax handling integrated.
        iii. Post-onboarding, code adjustments will still be handled by Ditstek but no manual DB column handling will be needed.
        iv. Future phase:
            1. Role-based onboarding permissions.
            2. Branch update requests by companies.
            3. Auto-invoicing for payments inside the system.
    b. **Plans & Pricing Strategy**
        i. Jaspreet proposed **Basic / Pro / Enterprise** tiering with modular add-ons.
        ii. Teresa clarified:
            1. The current directive is **"no piecing out"** – one package, one price.
            2. Reason: earlier assumption that modularization would be too complex.
        iii. Teresa to reconfirm with Tom whether a modular/tiered approach can be allowed.
        iv. Standalone modules identified: **ATS, Training, ERM** → could be optional add-ons without dependencies.
        v. The core package remains bundled: **HRM, Operations Hub, Scheduling, Company Settings**.
        vi. Pricing implications to be reviewed once Tom provides input.
    c. **Discussion Points:**
        i. Phase Two will introduce **client onboarding** with the ability to create **custom plans**.
        ii. During onboarding:
            1. Collect **branch and employee details**.
            2. Automatically create **clusters** based on input.
            3. Handle database/domain connections.
        iii. Earlier stance: keep modules tightly coupled (all-in-one software).
        iv. Current consensus: allow **loosely coupled modules** to capture a wider market segment.
    d. **Plan Structures (Proposed):**
        i. **Base/Basic Plan:** HRM + Reports.
        ii. **Pro Plan:** HRM + Scheduling + Payroll.

        iii. **Enterprise Plan:** Full system access (Ops, Fleet Management, etc.).
        iv. **Optional Standalone Modules:** Training, Analytics, ERM, ATS, Team Support.
        v. Fleet Management can be bundled in **Enterprise** or considered as a separate **add-on**.
    e. **Market Consideration:**
        i. Many clients want only specific modules and avoid paying for unused features.
        ii. By offering modular packages, CHS can **expand market reach** and **upsell gradually**.
    f. Action Items:
        i. Create a **chart/matrix** showing which modules can be separated without breaking system functionality.
        ii. Identify **dependencies** (e.g., Payroll requires HRM & Scheduling).
        iii. Define **base system scope** vs. **optional modules**.

2. KPI (Key Performance Indicators)
    a. KPI Framework:
        i. Attendance (Call-outs)
            1. Rule-based:
                a. No call-outs = +10 points.
                b. Call-out = –5 points.
            2. KPI points should be configurable per company (customizable).
            3. System to track attendance via call-outs, not just shifts worked.
            4. Punctuality to be included under attendance KPI.
            5. Rules discussed:
                a. Shift start at 9:00 → employee should log in **at or before** 9:00.
                b. **Late check-ins** → negative points (e.g., –1 point or as configured by company).
                c. **Perfect attendance** → positive points across all departments.
        ii. Reports (Department-based)
            1. KPI setup must be department-specific.
            2. Rules:
                a. Example: “X highlighted reports = Y points/day.”
                b. Points vary by priority levels (e.g., high/medium).
            3. Reports currently linked to 10-codes; points may be tied to usage and highlights.
            4. Linking includes selection of reports(KPI Rule), the department, activity code’s priority and then points.
        iii. Training
            1. Tom suggested training should **not** be a KPI for now.
                a. Reference: some companies (e.g., Grand Caron) do daily training, but not suitable for CHS at this stage.
                b. Decision: **Training KPI excluded** from current build; may be added later as an **add-on**.
            2. Alternative idea:

        a. If added in future, could be implemented as **self-certification** (e.g., "Did you train today? Yes/No" with points).
        b. Risk: cannot be verified automatically; needs manual supervision.

iv. **Department-Specific KPIs**
    1. KPIs should be tied to departments defined in **Company Settings**.
    2. Default KPI categories: **Reports, Complaints, Attendance**.
    3. Other departments (Sales, HR, Finance, Dispatch) need **customizable KPIs**.
    4. Challenges:
        a. Dispatch KPIs (e.g., listening to calls, reviewing reports) are hard to track automatically.
        b. Sales/HR/Finance → KPIs could be activity-based (e.g., number of calls, reports, visits).
    5. Proposed solution:
        a. Allow supervisors to **grade employees manually** using forms.
        b. Example: Sales KPI → 5 cold calls, 5 visits, 2 appointments, 1 close.
        c. Activity codes can be linked to **department-specific tasks**.

v. **KPI via Activity Codes & Form Builder**
    1. Proposal to leverage **Activity Codes** with **KPI tracking flag**:
        a. Each activity code can be linked to a KPI.
        b. Admin can define whether KPI scoring is **automatic** or **manual**.
    2. **Automatic mode:**
        a. Example: "50 calls" target. If an employee records 50, full score. If only 10, then partial points (1/5th).
    3. **Manual mode:**
        a. Supervisor grades performance based on submitted activity reports.
        b. Example: Dispatch KPI → "Reviewed 5 bodycams today" → supervisor verifies and assigns score.
    4. **Form Builder extension:**
        a. Simple Q&A forms (not full complex builder).
        b. Each form linked to an activity code with scoring rules.

vi. **Automation vs. Manual Scoring**
    1. The system should handle what it can track automatically (e.g., attendance, activity submissions).
    2. For KPIs that cannot be system-tracked (e.g., dispatch quality checks, sales effectiveness), **manual supervisor grading** is required.
    3. Manual grading can be done through **activity templates** or **form inputs**.
    4. Key principle: **Hybrid model** (system + supervisor grading).

vii. **Discussion Points:**

1. Current focus should be on **wireframing before development** to clearly define workflows.
2. Figma will be used to design the **UI and linking structure** (activity codes → reporting → KPI assignment).
3. Wireframes will help visualize how templates are created, placed, and linked across screens before coding starts.
4. The activity code system will have options for:
    a. **Automatic scoring** (system-assigned points).
    b. **Manual scoring** (supervisor/admin assigned).
5. Checkbox/radio button in activity code creation to enable "Track KPI," define frequency (daily/weekly/monthly), and assign point values.
6. Supervisor intervention possible in case of discrepancies (manual override of scores).

viii. **Action Items:**

1. Prepare **Figma wireframes** for KPI module (focus on activity codes, templates, and scoring mechanism).
2. Map **system events** that can trigger KPI points.
3. Showcase how data flows from activity codes → reports → KPI tracking.

3. Admin Panel – Phase One Recap

a. **Showcased Features:**

i. Dashboard graphs: total signs, clients, revenue, system users, site/beat stats.
ii. Comparative insights: client growth, revenue trends, user growth, site/beat activity.
iii. Client details: company name, ID, branches, domain, onboarding date, contacts, locations.
iv. Subscription details: including number of users (since billing is user-based).
v. Functionality to **select and launch a client instance**.
vi. Planned additions: comment status, billing cycle management, subscription package creation, notifications, and email alerts.

b. Status:

i. Development completed.
ii. Currently in the testing **phase**.
iii. Designs for some sections are still **pending**.

c. Admin Panel – Phase Two Goals

i. Objective:

1. Reduce dependency on manual onboarding and lower hidden costs by enabling **streamlined onboarding with minimal human intervention**.

ii. **Features to Introduce:**

1. Simplified onboarding flow: capture company data, contacts, subscription info, user count.
2. Automated billing cycle creation and notifications.
3. API integration with banking/payment system for **automatic withdrawals**.

        4. Move toward **self-service onboarding** in later stages.
   - **d. Long-Term Vision – Self-Onboarding (Phase Three / Future Roadmap)**
      - i. **Inspiration:** QuickBooks-style onboarding.
      - ii. **Workflow:**
         1. The user visits CommandHubSolutions.com.
         2. Clicks **Sign Up for Free Trial** (next to Book Demo).
         3. Step-by-step process:
            - a. Enter personal/org details.
            - b. Enter payment info (30-day trial, auto-charge if not canceled).
            - c. Define super admin credentials.
            - d. Create the first client, site, employees, roles, activity codes.
            - e. Select package (Basic/Pro/Enterprise).
            - f. Upload logo and key details.
         4. System enforces setup order (forced training → ensures functionality).
         5. Training videos embedded during signup for self-learning.
         6. Once completed, client is fully onboarded and billed automatically.
      - **iii. Dual Onboarding Options:**
         1. **Self-Service Model (Cheaper):** Clients sign up, configure, and train themselves with video guides; no sales/onboarding team involvement.
         2. **Managed Onboarding (Premium):** Involves sales, account managers, onboarding/training team; higher cost due to personalized support.
   - **e. Business Implications**
      - i. **Hidden Costs:** Current onboarding process involves commissions (sales/account managers), manual client data setup, and training overhead.
      - ii. **Cost Reduction Strategy:**
         1. **Phase Two:** Streamlined onboarding, reducing dependency on people like Teresa and Dev team.
         2. **Future Phase:** Self-onboarding eliminates onboarding team costs, shifting toward automated processes.
   - **f. Key Decisions**
      - i. **Phase One:** Testing ongoing; enhancements (notifications, subscription management) to be finalized.
      - ii. **Phase Two:** Focus on simplifying onboarding, automating billing, and minimizing manual involvement.
      - iii. **Future Phase (Self-Onboarding):** To be designed as a "dream state," modeled after QuickBooks flow.
      - iv. Two onboarding models will exist: **Managed vs. Self-Service**, priced differently.

4. **Meeting Schedule Changes**
   - a. **Current Schedule:** Regular production calls planned for 30th September, 1st October, and 2nd October.
   - b. **Change Proposed:** Skip the call on **2nd October** due to scheduling overlap.

c. **Agreement:**
    i. Maintain a call on 30th September with Suzanne (Coastal Payroll).
    ii. Keep regular calls on 1st October.
    iii. Skip 2nd October call for that week only.

5. **System Issues & Updates**
    a. **Mass Email Issue (PSSP)**
        i. **Problem:** Mass email sending failing (both single and multiple emails). Worked in August; issue now reoccurring.
        ii. **Investigation Findings:**
            1. Not caused by the client's email server.
            2. System-related issues confirmed — test emails work, but mass emails do not get sent.
            3. No bounce-back or outbox logs found.
        iii. **Next Steps:**
            1. Test with CityWide system (similar codebase to PSSP).
            2. Conduct controlled mass email test with selected recipients (Jaspreet, Tanya, Robert, Scott, etc.).
            3. Organizer to log into PSSP account to investigate and update build accordingly.
    b. **Mobile Application Issues**
        i. **Problem:** Certain users experience schedule visibility issues requiring deletion and reinstallation of the app.
        ii. **Investigation:**
            1. Affected users are limited, not universal.
            2. No crash logs were reported except one last Saturday.
            3. Issue related to schedule not displaying, not app crashing.
        iii. **Next Steps:**
            1. Organizer to review mobile app logs in detail.
            2. Additional testing after build update.
    c. **Scheduling & Service Type Changes**
        i. **Scenario Discussed:** Changing a service type affecting existing schedules.
        ii. **Clarification:**
            1. Changing service type removes scheduler mapping for that service.
            2. Adding services results in multiple mappings; removing services reduces mappings.
            3. Relabeling services possible without affecting schedules if implemented accordingly.
        iii. **Action:**
            1. Confirm training for Tanya to prevent misunderstandings.
            2. CommandHub Solutions to monitor and report any issues moving forward.
    d. **Payroll Implementation – Bulk Check-In/Check-Out**
        i. **New Feature:** Bulk check-in, bulk check-out, and combined check-in/out functions for multiple employees.
        ii. **Functionality:**
            1. Selecting employees → confirming bulk action → updates shift status to "completed."

2. Breaks management: Paid (copy break) and unpaid (fun break) tracked separately.

iii. **Pending Items:**
   1. Mass update option for unpaid breaks to ensure accurate payroll processing.
   2. Development team evaluating implementation approach.

iv. **Next Steps:**
   1. Update staging environment.
   2. Production build update to follow after testing completion.