Inception

- Client Meeting preparation
- Client Meeting – Gathering Requirements

Client meeting preparation

📋Overview

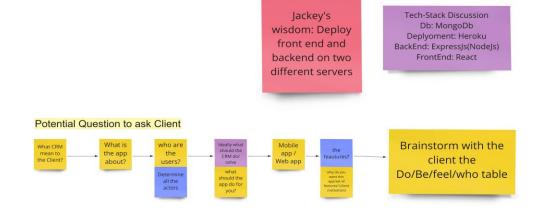A quick meet up to discuss the potential question to our Client Li Wei

Meeting facilitator	Edward
Attendees	Jackey, Hans, Jawad, Mia
Workspace	https://miro.com/app/board/o9J_l2kJWW4=/
Date/time	11/Aug/2021 3:00PM to 4:15PM AEST

🕐Meeting agenda

📚Resources

1. https://www.atlassian.com/team-playbook/plays/customer-interview
2. Link to Upskill:
1. https://reactjs.org/docs/thinking-in-react.html
2. https://www.freecodecamp.org/news/how-to-create-a-react-app-with-a-node-backend-the-complete-guide/

Client Meeting - Gathering Requirement

📋Overview

Goals

1. Meet the client
2. Understand the client's need
3. Gather requirements

Meeting facilitator	Mia
Attendees	Wei Li, Edward, Jackey, Hans, Jawad,
Meeting link	https://unimelb.zoom.us/j/81310435396?pwd=RFpOY0VMckxNcU5xcXRpd0JoYmNDdz09
Meeting Recording link	https://drive.google.com/file/d/1zVxyLwa7sXOlYhNlJM385z31ChGgC5vj/view?usp=sharing_eip_m&ts=6

⏰Meeting agenda

Meeting date-12 Aug 2021 1:00PM-2:00PM AEST

Agenda	
5 min	Introduction (Mia)
5min * 6 =30 min	Ask Questions
10 min	Complete the Do-Be-Feel-Who Table
5 min	Wrap up

Notes:

- CRM should record every important business detail, such as details of deals, contact methods and contact numbers/ address
- Web app/ Device app both fine, up to our team to decide (we decided web app)
- CRM needs to create/ delete/ update a deal with a customer/ company (e.g A deal with Microsoft, need their contact details and method, their direct contact person, requires 1 admin users and multiple normal users)
- Record all the deals and a dashboard to display this
- Dashboard-> like a Kanban board(calls it sales pipeline) `NewLead-> contact made-> Proposal sent`
- Only one sided, business to customer or (potential)
- Needs charts to display deals made
- Sorting on graphs by activity types, deals conversion, deal by customer, or add more types
- Future deals, sent plan but not yet signed then can move its status once signed to "new"
- Store Deals: {States: [Ongoing, Completed, Future/Drafts]}
- Brief deal previews to include customer contact details: tel:/mailto: (livechat optional)
- Live overview page, for view-only users
- Phone Calls and emails
- Refer to the crypto - hive