THIS TICKET IS FOR: BTM 481

SYSTEMS ANALYSIS & RECOMMENDATIONS

SECTION A - FALL 2020
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weezevent

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Weezevent Canada

Systems Analysis and Recommendations

Presented to Dr. M. Büyükkurt

For the class BTM 481 A - Information Systems Analysis

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1. Executive Summary

Weezevent is a French SaaS company, founded in 2008, operating within the Event Management Industry. Weezevent's main purpose is to help event organizers around the world organize better events thanks to technology. Since its inception, Weezevent has experienced exponential growth and expanded its reach in several countries including Canada in 2014. This branch, located in Montreal, now employs four people who are dedicated to scale and tailor the Weezevent products to the Canadian event organizers.

The company currently offers 4 products, all tailored around facilitating event management:

- WeezTicket, a self-service ticketing and registration platform,
- WeezAccess, a solution to facilitate large events access & crowd control,
- WeezPay, a fully integrated RFID cashless payment solution,
- WeezTarget, a Marketing and CRM solution for event organizers.

Working with Weezevent throughout the semester allowed us to analyze and record their different processes, the system analysis was conducted on the sales operations of Weezevent Canada and focused on the business development, sales processing, and customer engagement.

After conducting a series of interviews and collecting documents, we were able to model the current system Data Flow and Use Case diagrams. These came as useful tools for understanding the functions and interactions of the system. An analysis of the current processes using the PIECES framework has shed light on several problems and helped identify their underlying cause. The system investigation allowed us to detect the user requirements to take into consideration when putting together our recommendations.

The following recommendations were integrated into a proposed system Data Flow diagram which ultimately aims to provide Weezevent Canada with more efficient processes to conduct their sales operations, and provide their customers with better services:

- Creation of a pre-meeting questionnaire
- Adaptation of product presentation
- Automation of the scheduling system
- Systemization of customer engagement
- Update of CRM fields

2. Client Introduction[1]

2.1 Company Background

Weezevent is a French technology company, founded in 2008, operating within the Event Management Industry. Weezevent's main purpose is to help event organizers around the world organize better events thanks to technology. Launching as the first-ever Software as a Service (SaaS) event ticketing platform in Europe, Weezevent is aimed at event organizers hoping to gain full control and transparency over their event organization and logistics. Since its inception, Weezevent has experienced exponential growth, adding 230,000 event organizers around the world and more than half a million event organizers in 2018. Most notably, Weezevent has processed more than 242 Million dollars through their various services in 2018.

In 2015, Weezevent expanded its reach to the Canadian market by opening an office in Montreal. The company currently offers 4 products, all tailored around facilitating event management:

- WeezTicket, a self-service ticketing and registration platform;
- WeezAccess, an a-la-carte service aimed to facilitate large events access & crowd control;
- WeezPay, a fully integrated RFID cashless payment solution (*Radio Frequency Identification* (RFID) is the wireless non-contact use of radiofrequency waves to transfer data);
- WeezTarget, a Marketing and CRM solution for event organizers.

[1] APPENDIX 1, 2 & 3 - Initial Letter to the Client, Final Letter to the Client & Client Contact Information

Currently, the Canadian office is composed of 4 employees: a Country Manager, a Customer Success Manager (CSM), an accountant and a part-time salesperson. Throughout the course of the project, our main point of contact for this project has been Julien Desrosier, the Canadian Office General Manager and Sales Manager.

2.2 Initial Problem Statement[2]

During our initial discovery sessions with our client, it was expressed that one of the biggest pain points was regarding the business development processes currently in place: indeed, the current processes in place are too lengthy, don't gather all the necessary information for effective communication, and often lead to confusion between the multiple team members. Additionally, the client expressed his interest in developing the post-event client engagement processes, as there are currently very few ways to engage with customers once an event is over: how can we help ensure Weezevent remains top of mind for clients once an event has happened?

2.3 Roles

Throughout the mandate, our team's main point of contact with the client was Julien Desrosier. Julien is Weezevent's Canada Country Manager and has been with Weezevent ever since they opened the Montreal office in 2015. Since its opening, Julien has been in charge of building and managing the Canadian team, as well as establishing Weezevent as a player within the event planning and logistics industry here in Canada. Currently, he focuses most of his time working on Business Development and is constantly finding new ways to onboard more clients onto the Weezevent ecosystem.

[2] APPENDIX 4 - Revised Project Proposal

3. Team Management

As clearly defined at the beginning of the semester by Dr. Büyükkurt, there is a difference between a team and a group. In a team, individuals combine their work and share their purpose and devotion for each other, as well as for the project they are working on. This mutual commitment to the same goals is key to distinguishing the dynamics between a team, and a collection of people completing separate tasks, which can be simply defined as a group.

Due to the exceptional circumstances of 2020, students needed to form their teams through Zoom. We were put in "breakout rooms" (a feature within the app) and presented our goals for this semester, our strengths and courage, our areas for growth. Essentially, we were on the lookout for students who were complementary to us. Once Team 2 was formed, we tackled the team contract[3], which was especially helpful for us this year since meeting in person was not possible. We agreed on hosting team meetings via Zoom every Thursday from 3:00 PM to 6:00 PM. However, as the semester progressed, we faced some complications during that meeting time, as we realized that managing six people with six different schedules was indeed hectic. We agreed on still meeting every week (or more when needed), every Friday morning starting at 10:00 AM. As shown in the Meeting Minutes[4], the starting time sometimes varied, depending on the amount of work that needed to get done. The Team Contract also helped us in dealing with issues such as tardiness and absences. We allowed each team member to have a maximum of two shortcomings, whether this included sickness, appointments, or failing to remember a scheduled meeting. Beyond this, we would penalize the member with a 10% reduction in the Peer Evaluation

[3] APPENDIX 7 - Team Contract
[4] APPENDIX 8 - Meeting Minutes

form for each strike. Thankfully, our Team is very accountable and we did not encounter any of these repetitive issues during the semester.

The Team Contract also helped us follow a schedule. Since we separated the roles of leader and scribes for the entire semester, we simply needed to refer to it at the beginning of each week. Each team member had the opportunity to be a leader and a scribe, as the roles rotated equally. We decided to assign two scribes per week for the notes to be as complete as possible during our weekly meetings or the interviews with our client.

Regarding our team dynamics, we were lucky enough this semester to have formed a team where every single member is responsible and understanding. The commitment of our team was reflected in the responsiveness in our group chats, in the participation during our meetings, and the completion of all the deadlines set for the week. Fortunately, we did not encounter any conflicts between team members, as everyone demonstrated high emotional intelligence and cooperativeness. Any disagreements were handled democratically.

For all of our team members, this was the first class we had ever attended to reshape our way of learning; from the physical to the logical flow of data, to the way, a group of people should work together. We expect to apply this added-value learning experience to the continuation of our university classes and for our future careers.

4. Systems Investigation

As mentioned in the introduction of the report, Weezevents is a large company with four offices around the world, with roughly 80 employees. Due to the size of the company we

decided to reduce our scope to a smaller scale and focus only on the newly opened Montreal office. The following section will explain the overall system components, including the scope of this project, which will include the three subsystems covered in our project: Business Development, Process Sale and Engage Customer. We will also discuss other terms such as inputs, outputs and entities. As the complexity of the system can be difficult to grasp at times, please refer to the glossary of terms[5] in the Appendix page.

We will be taking a look at every aspect of a system's components, which are the entities, inputs, outputs, interface, boundaries, feedback, control, constraints, subsystems and buffers. Note that all examples mentioned are taken from the models drawn about the current system at Weezevent Canada. Also, each component can be integrated within each **Subsystem**, which is defined by a grouping of related entities within a system.

Entities refer to the smallest unit of the system. In the Engage Customer subsystem, they entail processes such as "Add a customer to Newsletter recipients", "Send monthly newsletter" or "Receive Newsletter unsubscription". For example, the "send monthly newsletter" process will send the newsletter produced by the Marketing team to the customers who are listed as recipients of the newsletter.

Additionally, **Inputs** are simply the flow of information from the environment to the system. An example of information that is being received from its outside environment would be in the Business Development subsystem. In this example, the inflow of "Event & interest details" from the Lead eternal entity to the process "Assess lead interest" triggers and allows the assessment of the Lead qualifications. We can observe another example of Inputs in the Process Sales subsystem, the process "receive event requirements", as its name indicates,

[5] APPENDIX 9 - Glossary of Terms

receives "Event details & requirements" from the Lead external entity which can then be stored in "Events" to be accessed at a later time.

Furthermore, **Outputs** refer to the flow of data from the system to the environment. Instances of outputs can be found in the Process Sale subsystem, such as the process "Propose initial product selection" which refers to sending a product selection to the Lead external entity, this is an output from the system.

Also, **Interface** is the communication between subsystems. For instance, when the Business Development subsystem uses the "Schedules" data store, it triggers the beginning of another subsystem: the Process Sale. Since data is shared between the two subsystems, the Process Sale subsystem cannot start until the information is provided to the "Schedules" data store.

As for **Boundaries**, they separate the system from the environment as they identify the processes that are either inside or outside of the scope. For instance, we focused [6]on the inclusion of all three subsystems mentioned above: the operational process and product creation are still part of the system's environment but remain outside our scope, as they are part of a different department.

Weezevents has no **Feedback** system in place to notice any reaction to the performance of the system's environment, therefore no **Control** as there is no internal mechanism to respond to the feedback so it can maintain itself.

[6]on APPENDIX 4 - Revised Project Proposal

Furthermore, **Buffers** are extra resources used to reduce the dependence between subsystems. For example, there are data stores in all three subsystems. If we look at the Business Development subsystem, there are data stores for Schedules and Leads.

Lastly, **Constraints** are limited resources that are available to the system. This is true as Weezevent works with the CRM HubSpot. They are constrained by the scope of this software and the functionalities it, even though it covers most of their needs.

4.1 System Component Example

The following charts will provide brief examples of each subsystem and a better understanding of what the glossary terms are implemented. The component examples are found in the "Component" column below and are explained in simpler terms.

Subsystem 1: Develop Business

As labelled in the DFD	Component	Description
Data flow P1.7 to D3, From D3 to Process P2.1 (Receive event requirements)	Interface	As D3 communicates between both subsystems we can say this is an interface. Data is stored from P1.7 in D3, D3 can send the data to P2.1 to commence the Process Sale subsystem
D1 Leads	Buffer	Data is stored is only used when acted upon, as the potential leads are stored in the database D1, process 1.1 only addresses the lead at a later time.
Event & Interest Solicitation details From P1.1 to the Lead	Output	As the "event & interest solicitation details" are being sent to the Lead (external entity), there is a flow of data leaving the environment.
Event details and interest details(From the lead to P1.2	Input	The flow of information from the lead to the process "assess lead qualification". The "event details and interest details" flowing into the system environment.

(Examples shown in the text above, Business Develop, refer to the current DFD[7])

Subsystem 2: Process Sale

As labelled in the DFD	Component	Description
Approved proposal details (From P2.6 to Accounting)	Output	Sending "approved proposal details" to the accounting department(external entity) which is outside the environment of the system.
Event requirement details (From the Lead to the P2.1)	Input	The flow of information from the Lead(external entity) to process "receive event requirements". The "event requirement details" are flowing into the system environment.

(Examples shown in text above, Process Sale, refer to the current DFD[8])

Subsystem 3: Engage Customer

As labelled in the DFD	Component	Description
Send Monthly Newsletter (P3.3) receives data from Marketing and Newsletter Recipients DB and sends out data to Customer and Newsletters DB	Entity	As we have 2 inflows of data and 2 outflows of data. We consider this to be an entity as the process cant be broken down anymore.
Newsletter content details From P3.3 to the Customer	Output	Sending the "Newsletter content details" to the customer regularly represents an output of the system, data flows outside the environment of the system

(Examples shown in the text above, Engage customer, refer to the currentDFD[9])

[7] APPENDIX 10 - Current DFDs, Subsystem 1
[8] APPENDIX 10 - Current DFDs, Subsystem 2
[9] APPENDIX 10 - Current DFDs, Subsystem 3

5. Fact Finding Techniques

Fact-Finding is an approach taken to gather information through different types of mediums, whether they are interviews, questionnaires, sampling, and others, to analyze a system. For the system analysis of Weezevent, Team 2 conducted interviews[10], observations[11] and collected documents[12] to acquire information. These fact-finding techniques helped our team grasp a solid understanding of Weezevent's current system, as well as their business processes and user requirements. The following section will present a further explanation of how these techniques were undertaken and the tangible results that flourished from them.

5.1 Interviews

Interviews were primarily the most effective way of communicating with our clients. These interviews were conducted roughly every other week throughout the semester (amounting to a total of 4 interviews) which helped us underline the key issues the Weezevent's sales division was having. Through in-person interviews would have been preferred to build a stronger relationship with our client, the current circumstances forced us to conduct the interviews via Zoom, as it was the most practical and efficient way of communicating. As a team, we made it our responsibility to not waste our client's time. We made sure to always have a team meeting before the client interview to go over the questions we wanted to ask Julien to finalize any topics we needed to approach. With every meeting held, our understanding of Weezevent grew, which was a very good indicator for our team that we were asking the right questions. Besides, we allowed each other to individually build a professional relationship with Julien as much as we could. Everyone in our team was able to

[10] APPENDIX 5 - Interview and Observations Minutes
[11] APPENDIX 5 - Interview and Observations Minutes
[12] APPENDIX 6 - Documents Collected

reach out to him by email at least once, to clarify some points brought up during the meetings and to follow up with future ones. Our Team especially took this part of the project seriously, as we wanted to feel equally involved with Julien. The reason for this is because two out of the six-team members had already closely worked with him in the past. Additionally, the designated scribes of the week were responsible for taking notes at each meeting. The roles rotated every week as shown in our Team Contract. These notes were very useful when working on our project as it helped us maximize our time and effort, up until we needed to meet with Julien once again.

5.2 Documents Collected

While building our project, we realized that there were instances where the lack of information was too important to continue. At the beginning of the semester, if we needed clarification on a particular question from our client, we'd put a hold on that particular task and work on some other areas, until we met with him again. But as the semester progressed, the project got increasingly more demanding, so these clarifications were crucial for the continuation of our work; this is when we'd contact Julien by email. Of course, knowing that Julien is working with us on his own time, we did not want to bombard him with demands. Therefore, whenever we hit these major roadblocks, we'd come together as a team and construct a concise list of questions we wanted to ask him. In this manner, we'd send an email with clear, numbered questions. Soon enough, we noticed that this written form of communication was the best and most efficient way of dealing with our client, as his answers were always straightforward and well structured.

In addition to collected emails, Julien was kind enough to send us their presentation slides. This is a 100-page presentation slide that the company sends to their client during their initial meeting. Going through this document made us realize that it is much too heavy for a first

presentation, and therefore helped us recognize possible improvements that could be made within the current system.

5.3 Observations

Although the observation technique can be rather useful in some researches, we soon realized that given the scope of our project, the observation was not entirely helpful for us. However, since most of our team members had not heard about Weezevent in the past, we individually headed to their official website to familiarize ourselves a little more with their business. Two of our members had worked in collaboration in the past with Weezevents to organize events for Concordia students, which provided the rest of the team with an extra layer of support when needed. Unfortunately, as resourceful as it was to navigate through their website, this action did not bring much value to our assignment, as the information collected was very surface level. This step in our fact-finding research was mainly aimed for the team members to have a better idea of the business.

Conversely, during one of the meetings with our client, he proposed the team to show us the company's CRM: Hubspot. He shared his screen during the Zoom meeting and walked us through the logic between leads, events and deals, with the data that goes in each of those categories and their current statuses. This meeting was insightful for the team, as this step in the sales process, as mentioned by our client, was one of the most time-consuming steps. Although this would have been a great opportunity to optimize our client's work, it was unfortunately out of our scope; the amelioration of an outside data entry platform is not an aspect we covered in our project. In comparison to the interviews conducted and emails exchanged with Julien, our observations were not as helpful for the development of the proposed DFDs, as most of our information was collected through the former mediums of communication mentioned.

6. Models of the Current System

From all the information we gathered with the client and using the knowledge gained during the semester regarding data flow modelling, we were able to map out the three selected business processes at Weezevent Canada:

1. Business Development
2. Process Sales
3. Engage Customer

We added a glossary of terms[13] in the appendix to refer to when going through the different DFD components, use case models and logic definition tables. It is important to understand that data flow modelling refers to the logical flow of processes, not the physical. In other words, it refers to what the system does, not how the system does it.

Along with the Data Flow Diagrams (DFD) in the Appendix, the following narratives refer to each of them and describe what tasks are performed in each subsystem independently.

In addition to each subsystem DFD, the higher level DFDs, namely context-level[14] and level-0[15], are also attached as appendices. They respectively showcase which entities the whole system communicates with and how each subsystem is linked to the others.

Finally, Use case diagrams[16] offer a different representation while focusing on the interactions that external actors have with the system.

[13] APPENDIX 9 - Glossary of terms
[14] APPENDIX 10 - Current DFDs, Context Level
[15] APPENDIX 10 - Current DFDs, Level-0
[16] APPENDIX 11 - Use Cases

6.1 Narratives:

6.1.1 Develop Business[17]

The Develop Business subsystem represents the list of processes performed by the sales team to reach to potential new potential customers of Weezevent, let them know of Weezevent services, assess their interest and schedule a meeting if interest there is.

It all starts with the business developer receiving a list of potential customers called "Leads" and when he/she has time, starts contacting them, asking if they would be interested in hearing more about Weezevent's products. If the lead answers and declines the proposition, the business developer marks the lead as declined and adds any useful information to the decline if there is any. If the lead accepts, it is also marked on the lead. When the business developer has time, they start requesting meeting availabilities to the interested leads. Once the lead answers with their preferred time to meet, the business developer checks his schedule to see if there is a match. If there is, the business developer officially schedules a meeting by updating his/her schedule and confirming the date and time with the lead. If there isn't any match, the business developer requests another meeting availability to the lead. Once the lead answer, the same steps are repeated until a common meeting time is found and then officially scheduled.

Also, the lead can step out of this process at any point in time. They do so by letting the business developer know and he/she will indicate the details of the decline directly on the lead associated data.

[17] APPENDIX 10 - Current DFD, Subsystem 1

6.1.2 Process Sale[18]

The Process Sale subsystem contains the presentation of Weezevent products to the lead and the collection of their event requirements, the negotiation in the selection of products for the event, as well as the negotiation for the proposal.

Once a meeting time has been confirmed with the lead, the salesperson meets with them to collect their event requirements and give them all the details they need about the different products. At the end of their conversation, the salesperson will update the event data with everything he/she remembers. When the salesperson has time, they will take into consideration the information collected during the meeting to propose to lead a suitable product selection looking at the different offerings they have. If the lead refuses the selection, the salesperson will send her a revised selection while still meeting the event information and the product offering that would match. This process is repeated until the lead confirms the alternate product selection. Once it is confirmed, the final product selection is saved in a document. When the salesperson has time, he/she will retrieve this product selection and start writing a proposal with the necessary details collected about the event. Once the proposal is written, it is saved and sent to the lead. The lead will then answer with her approval or decline and explanation of the proposal. If it is declined, the salesperson will try to answer the lead decline reasons and write a new proposal. These last steps are repeated until a common ground is found for the proposal. Once a proposal is approved the last saved proposal is marked as confirmed, its details are sent to the accounting department and the salesperson can update the lead and create an official customer.

The lead can step out of this system at any point in time, they do so by letting the business developer know and he/she will indicate the details of the decline directly on the lead associated data.

[18] APPENDIX 10 - Current DFD, Subsystem 2

6.1.3 Engage Customer[19]

The Engage Customer subsystem refers to all the activities performed to engage with the customers after their event and try to retain them as active customers.

Once a customer registers on the Website portal, this will store a new account and it will then be added to the list of newsletter recipients. Each month, the Marketing department produces a new newsletter and it is directly sent to the customers who are recipients and stored in the newsletter archive. At any point in time, the lead can unsubscribe from the Newsletters, in this case, they are removed from the list of recipients and will not receive the newsletter again.

[19] APPENDIX 10 - Current DFD, Subsystem 3

7. Problem Analysis: PIECES Framework

7.1 Introduction of PIECES

PIECES framework is a methodology that is used to better classify problems, opportunities, and directives the client may be facing. This framework is useful to be able to view the issues in a clear visual representation. In the following, an in-depth analysis of each issue will be conducted. To make it easier to follow the copious amounts of issues that can arise in a system, a visual representation[20] are made to make it easier to follow.

7.2 Justification of the PIECES framework

By using the PIECES framework, system analysts can pinpoint initial problems/symptoms and categorize them. The acronym is based on the following six components: performance, information, economics, control, efficiency and service. A problem can be categorized into more than one category. Each component has an equivalent weight when comparing each impact to the system. The **performance** segment focuses on the throughput, also known as the rate at which something is processed, and response time. The **information** component is everything that has to do with how data is processed. More specifically, the outputs, inputs and stored data. It measures whether or not there is a lack of data, the data is not properly captured or not properly stored. The **economics** section is everything related to the costs and profits of the system. For **control**, it includes security and how much control that upper management has. **Efficiency** is evaluating whether or not the resources that are disposable for certain processes are

[20] of APPENDIX 12 - PIECES Analysis & Underlying problems

properly utilized and not wasted. These resources can range from funding to human capital. Finally, the **service** component focuses on any customer-related activities.

7.3 Pieces Narration

Develop Business and Sales Process Combined

Weezevent's Montreal based office is a very small team. To keep track of the clients and the stages that they are in, the team uses Hubspot (CRM software). The issue that arises here is that it takes too long to update and maintain the client data in the CRM. This would pose a risk to the Develop Business and Process Sales subsystems because it can lead to data loss when the sales development team doesn't keep updating the HubSpot.

Another issue that is associated with the CRM platform is the sales process identification. In total, there are 9 different steps. Added on to having too many sales process steps, there is no clear understanding of each step by the whole Montreal team. This means that every individual in the office has a different understanding of what each step truly signifies. This would pose a risk to the Develop Business and Process Sales subsystems.

Develop Business

When a lead is interested in one of the products offered by Weezevents, they request more information about the offerings. To do so, they reach out to Julien, the salesman, directly. Julien then proceeds to send off a deck of over 100 slides with all of the Weezevent products. The issue that arises here is that the product offering can get too complicated and confusing, thus resulting in the loss of interest in a lead and never hearing back from them again. Continuing on the Weezevent offerings slide deck, leads can request it from the

salesman before even having an initial call. In some cases, some of the leads request this information but never proceed with the sales call.

When the salesman reaches out to a potential lead or if a lead reaches out directly to him, he requests to set up an initial call for the first contact. Going into the call, the salesman has little data about the potential customer, thus resulting in un-tailored initial calls. Julien conducts a small amount of research about the company, but not enough to allow him to tailor a specific offering. This can lead to him losing the interest of the lead during the initial call.

During the initial meeting, the salesman stores all of the data from the call in his memory. Depending on the lead, a lot of things can be discussed throughout the call. He then later transcribes the information retrieved into the CRM when he has time. This can cause some of the data to be inaccurate or missing when later transcribed.

All of the lead's information is stored in the CRM. Due to Weezevent's limited staff and heavy sales process, the response time of the system is quite slow. This results in a loss of leads in the pipeline that they are unable to serve.

Process Sales

Due to the heavy sales process, a sales development employee is only able to serve three leads at a time.

Engage Customer

Weezevent currently has very little in place to continue engaging with the customers who have done business with them in the past. Once the event is over there is no more contact with the client. He or she may receive a newsletter every month. There's isn't anything else put in place to ensure that customers keep coming back.

7.4 Discuss each PIECES category in summary Table 1[21]

The following section is a simplified in-depth explanation of each category of the PIECES framework. In Appendix 12, there is a clear explanation of all the issues that have been found and how they are related to each category.

Performance requirements represent the performance the system needs to exhibit to meet the needs of users. This is measured through response time and throughput. Throughput is the amount of work performed over a specific period and response time is the time frame between a request and a response within the system. Performance issues can be seen in the Develop business and Process sale subsystem. In Develop business, it occurs when there is a loss of leads in the pipeline due to the waiting times and in the Process sale, it occurs when the salesman is unable to consistently update the CRM due to the time it takes.

Information requirements are the information that is useful to the users in terms of content, timeliness, accuracy and format. This requirement is related to the data that goes in, out and is stored within the system. There are information issues in every subsystem, for example, there is a lack of information being collected before the initial call and the sales processes in the CRM are not properly identified throughout Weezevent.

Economy requirements represent anything related to the costs and profits of the system. Weezevents need to put more money into some of their software to increase the opportunity for profits. For example, they waste too much time on their CRM client updates that it limits their capacity of serving more clients at the same time.

[21] APPENDIX 12 - PIECES Analysis & Underlying Problems

Control (and security) requirements represent the environments in which the system operates all while having the proper degree of security provided. This is related to multiple things such as whether or not the system is secure if access to the system is controlled and how data is properly handled. For example, the notes taken during calls are stored in a memory data store.

Efficiency requirements represent the ability to produce outputs while using the least amount of resources needed. These resources can be people, machines, computers, etc. Examples of this at Weezevent can be seen throughout the majority of the system. in the insufficient collection of data before initial calls, maintenance of the CRM and more.

Service requirements represent the needs for the system to be reliable, expandable and flexible. The service issues can be found in the Engage Customer subsystem. There is very little put in place to expand with clients after their events.

7.5 Underlying problems

First of all, the process activities are too complex/inefficient. It is often found that some of the processes are too complicated and result in negative consequences. These do not only affect the Weezevent team but more importantly, the client. An example of this at Weezevent is the product offering that the salesmen send off to the client when he or she requests more information.

Secondly, data storage is not safe. The only proper data storage method in this system is through the CRM. The issue that arises here is that the CRM is not continuously updated because it takes too long. The salesmen resort to keeping most of the information in

his memory or emails before updating in the CRM. This can cause data not to be accurate or completely forgotten about. This falls in the information category of the framework.

The third issue is that data is not consistently updated. The current CRM put in place does not allow the Weezevent team to easily update information without taking a bit of time. This results in the CRM not being up to date because the information is not consistently updated. This relates to the performance, information and efficiency category of the framework.

The fourth issue is that data collection is not complete. Wrongful or incomplete information contributes to insecure data and wasted employee time because he or she is trying to find where the proper data is stored. This happens multiple times throughout the system. It happens when the salesman does not have enough data before starting the initial call and it also happens within the CRM because the data is not updated consistently. These fall within the information, performance and efficiency categories.

The fifth issue is that there is a lack of lead information before the meeting. This can result in the salesman going into the meeting unprepared with an un-tailored sales approach. This is a big issue that is included within the information, performance and efficiency categories.

Lastly, customers are not followed up after an event. Weezevent has very little already put in place to engage with the customer after they have completed their contractual requirements. This is a big issue and there is a big opportunity being lost here of customer retention. This problem is related to the information and service category.

7.6 IT Opportunities

Weezevent is very-well immersed in technology. The vast majority of their offerings are all tech-related, thus meaning that the team can properly adapt to new technologies

without having major issues internally. An opportunity would be a better Hubspot/CRM. The current version being used is too complex and is not tailored directly to Weezevent. The best thing for this team would be to have pre-set options within the CRM that allows them to update clients by selecting those common choices but still allowing them to add comments if needed. It would also be useful to have a team-wide training on HubSpot for the whole team to understand each stage of the sales process. Another IT opportunity would be to add the recommended engagement processes and recontacting procedures to increase customer engagement.

7.7 System Owners Directives

Following the official report. It is suggested that the system owner (Julien Desrosiers) becomes familiar with the underlying problems pointed out that relate to their business development, sales process and customer engagement. If the owner agrees with the outlined problems, he should consider implementing the following features into their system.

The salesman should send a pre-meeting questionnaire to the potential leads to get more information on the clients and be able to better serve them. He should also replace his typical scheduling method with a standard booking link to avoid any back and forth with the client.

To be able to engage with a customer after this contract is completed, Weezevent should send off additional feedback and testimonial requests. Another proposed solution for this is to set up standardized recontacting procedures. This is put in place to keep customers coming back and hopefully refer them to other people in the event planning industry.

8. User Requirement Analysis

Successful system development requires both the active involvement of the system owner as well as its users. For that reason, to provide a profound analysis with a proposed solution to the best of our abilities, we placed high importance on learning and interacting while keeping all the stakeholders in mind.

Through a series of observations and interviews, we collected user feedback to better discover the business' requirements and expectations of the system. Julien seemed content with the way things are being carried out, although he hinted at some areas of improvement. When asked about what he would like to come from the various subsystems, he gave us valuable insight as to what he saw as the main problems and what he would propose as his ideal solution. This information has accumulated in the following functional and non-functional requirements.

Julien hinted towards the need to address the efficiency of the current business development system currently in place. He also acknowledged that there was drastic room for improvement within the post-event customer engagement system.

The system owner requires to have processes that are efficient & easy to maintain, to ensure maximum productivity. Moreover, the owner mentioned that any new Data being captured should be easily accessible, safe, and consistently updated. These requirements are mandatory.

The main objective of the Engage Customer system is to develop a post-event

customer engagement process within the company. At this point, the post-event engagement processes are rather slim and consist mainly of memory-based triggers to engage with past customers. The customer success manager doesn't have any help from the system to engage with past customers. The system owner has voiced his interest related to the development and expansion of this subsystem.

Regarding functional requirements, the system owner has stated he would like to see that the process is well integrated with current other business processes and teams, such as the newsletter and CRM, as well as interconnected with the marketing department processes. Moreover, Julien mentioned his interest in developing a sense of community within the Canadian customer base: "How can we grow and engage with a community? What can we do to remain top of mind for our past customers?".

9. Specifications & Model(s) of the Proposed System

Based on the modelling of the current system and the different remarks and ambition of the client, our team has come up with many opportunities to improve. Considering the outcomes of the PIECES analysis and the different user requirements, we have developed a proposed system for Weezevent Canada to consider. Each subsystem will be treated separately.

To tackle the distinct underlying problems identified through the PIECES Analysis, we have come up with several solutions that are IT-related or represent a change in the way some tasks are performed at Weezevent Canada. These solutions are listed in the PIECES Table 2[22], justified for each subsystem and included in their narratives.

9.1 IT-related recommendations

Our system analysis regards the commercial functions of Weezevent Canada, which heavily rely on the services of a 3rd-party customer relationship management (CRM) software. Therefore it is given that there are solutions offered with their available features that can help in tackling some underlying problems. The solutions proposed are:

- The update of data fields to allow quick-fill to allow a faster collection of data from the business developer, which helps during a meeting when receiving numerous details about an event. An example of a quick fill data field is an option set instead that comes in replacement of a text field.

[22] APPENDIX 13 - PIECES Table 2 - Recommendation

- The manual update of data is long and losing the interest of updating it is common but it can be avoided with the implementation of automatic triggers. An example is the automatic change of leads status whenever both a call and an email have been logged.
- The collection of data cannot be complete if the list of available data fields is not covering all the possibilities of customer or event requirements, constantly adding and filtering fields is part of our recommendations

9.2 Non-IT recommendations and impact on the Proposed System

9.2.1 Develop Business[23][24]

Justification:

The introduction of the pre-meeting questionnaire will allow the collection of data before the initial meeting, which is crucial to offer more tailored solutions to the lead right at the beginning of the conversation. The different answers received from this questionnaire will also help the differentiation between leads and ultimately prioritization. It is also assumed that some leads may not need to receive the questionnaire as part of their discussions with the business developer.

Having an adapted product presentation document to share will help the business developer answer the lead needs and catch their interest before the meeting.

The booking link comes as a solution to save time and human error when scheduling numerous meetings via email or on the phone.

Changes in the narrative:

[23] APPENDIX 14 - Proposed DFDs: Subsystem 1
[24] APPENDIX 15 - Color Coded DFDs: Subsystem 1

When the business developer has time, he/she verifies[25] if the lead should receive a pre-meeting questionnaire depending if the lead is a returning one, if there are unusual event characteristics or if the contact person is tech-savvy. If it is not verified, the business developer then marks the lead type as hot if he/she considers it promising from his/her first interest solicitation, the lead type is then stored. If it is verified, the business developer then sends the pre-meeting questionnaire to the lead.

Once the lead answers the questionnaire, their answers are stored in a file for this purpose. When the business developer has time, he/she copies the questionnaire answers onto the lead data store and determines[26] if the lead type is hot depending on the answers to the questionnaire, the lead type is marked on the lead. If the lead specified in the questionnaire answers that they would like to receive more documentation about Weezevent products, the business developer sends adapted documentation to the lead after determining the lead type, referencing the product documentation.

When the salesperson has time, instead of requesting meeting availabilities to the interested leads and start negotiating a preferred meeting time, the business developer simply sends a meeting booking link to the lead. Once the lead selects a meeting time through the link, the business developer schedule is updated.

9.2.2 Engage Customer[27][28]

Justification:

[25] APPENDIX 16 - Logic Definition: Decision Table for P1.3
[26] APPENDIX 16 - Logic Definition: Decision Table for P1.6
[27] APPENDIX 14 - Proposed DFDs: Subsystem 3
[28] APPENDIX 15 - Color coded DFDs: Subsystem 3

The standardization of the customer feedback and testimonial request will allow the collection of customer's experiences in a single place (base for further product development) while receiving marketing content.

The invitation to an online community will drive discussions between users and ensure Weezevent remains top of mind for them.

The implementation of systematic recontacting procedures will help determine when to reach out to past customers and do it with a clear value-added for them.

Changes in the narrative:

When a message from the CSM stating that an event is finished, an email is sent with an online community link invitation to the customer as well as a request for feedback on their experience with Weezevent. Once the customer answers with feedback, it is stored in a document with all the other feedbacks. When the owner of the customer's account has time and if it is considered to be positive and valuable feedback, the customer will be asked if they would like to create an official testimonial, if they agree and send their testimonials, it is then stored.

At all times after having sent the community to invite link, if conditions are verified[29] to recontact the customer, the owner of their account will recontact them asking if they would be interested in collaborating once more with Weezevent or to let them know of new updates in Weezevent services.

10. Conclusion & Limitations

Over the course of the semester, Team 2 worked tirelessly to produce highly insightful results for Weezevent Canada. Our team members were given a tremendous opportunity to

[29] APPENDIX 16 - Logic Definition: Decision Table for P3.5

strengthen their business analyst skills while sharpening their organizational and time management capacities while working on a real-life case study. capabilities, and then use the data to analyze an issue and make recommendations. By incorporating strategies outlined in the Business Analysis Body of Knowledge (BABOK), our team was able to suggest highly actionable recommendations that we believe can yield great results regarding Weezevent's operations.

Throughout the 8 weeks of this project, we believe our team demonstrated excellent capacities in data collection and analysis. These great strengths gave our team the ability to properly understand how Weezevent's systems were structured and gave us the ability to propose highly qualified recommendations to optimize them. We think the suggestions made to Weezevent's Develop Business, Process Sale and Engage Customer will result in a tremendous gain for both all stakeholders involved within the sales development and customer success processes.

Looking back on the last few weeks, we believe our main limitation was regarding the time of the project, and the scope of the business. The team concentrated its efforts on three subsystems, which were considered to have the greatest potential for development or optimization on the client's side. With more time and resources on our hands, Team 2 would have thoroughly enjoyed tackling additional subsystems and developed additional suggestions for the current framework of the client.

Overall, Team 2 is truly pleased with the analysis and recommendations outlined in this report. We would like to sincerely thank our Client, Julien Desrosier, for his continuous trust and transparency throughout the project. Additionally, Team 2 would like to thank BTM 481 Section A professor, Dr.Büyükkurt, for the guidance and support exerted since week 1. To conclude,

Team 2 is pleased with the final results of this project, which we believe, results in improved business analyst skills for our group members as well as assisting Weezevent Canada in improving its processes.

11. Appendix

Appendix 1 - Initial Client Letter

Julien Desrosiers
Weezevent Canada Country Manager 09/29/2020
306-7080 Rue Alexandra,
Montréal, QC H2S 3J5

Hello Julien,

This email serves to confirm our decision to work with Weezevent on the information system and business processes analysis project within the scope of the BTM481 group project at JMSB. We'd like to sincerely thank you for the opportunity, your trust and future collaboration in the next four months.

As agreed with you during previous discussions, the scope of this project will focus specifically on Weezevent Canada and its large-scale event processes. Weezevent Canada's core mandate is to grow business demand and expand its market footprint across the country. Given this mandate, we've outlined two major systems that are core to Weezevent Canada's operations:

- The first business process will be regarding Weezevent Canada's business development process. This process groups Marketing, Business Development and Customer Success Management efforts.
- The second process regards the event operation business process. This process is managed and operated by the Customer Success Management team.

Given the complexity of this analysis, we will be needing your cooperation during the next three months. As discussed, we will be scheduling 8 hours of interview time throughout the semester and may require access to certain documents regarding your business processes at your discretion.

On our end, we agree to submit the following deliverables at the end of the project:

- A complete report of the systems analysis to be conducted including both the documentation and the analysis of the company's information system as well as the proposed system.
- A proposal for improvements in the company's current information system that will bring solutions to problems and meet users' requirements.
- You will also be invited to our final 20-minute presentation of those documents and will have the option of following up with us if you would like to give us feedback or if any of your questions have not been answered.

Thank you again for all your time and insights. We're all thrilled to get started on this project!

Sincerely,

Arnaud Lesur & Team 2

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Cc: Professor Dr.M.Büyükurt
meral.buyukkurt@concordia.ca

Appendix 2 - Final Letter to Client

Julien Desrosiers
Weezevent Canada Country Manager
306-7080 Rue Alexandra,
Montréal, QC H2S 3J5

12/05/2020

Dear Julien,

We wanted to inform you that the Weezevent Canada systems analysis report for our class project has finally been completed. We sincerely thank you for your time, effort and support on this project. It wouldn't have been possible without your trust and transparency!

At this point, we expect to be able to work on the design and solution project beginning of Q1 next year. We would love to continue this working relationship with you to help with the design of the proposed system outlined in our report.

We sincerely appreciate your role in providing us with the opportunity to enhance our learning experiences. Working on a real-life case has been incredibly rewarding for all of us, and we hope the recommendations outlined in the report are appreciated by you and your team.

If you have any questions, comments or concerns regarding the project, you can feel free to contact any member of our team (contact information below) as well as the professor in charge of this class.

Sincerely,

Simon Bel and Team 2

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Cc: Professor Dr.M.Büyükurt
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Appendix 3 - Client Contact Information

Point of contact for this project:

- **Julien Desrosiers**, Weezevent Canada Country Manager
- 306-7080 Rue Alexandra, Montréal, QC H2S 3J5
- julien.desrosiers@weezevent.com

Appendix 4 - Revised Project Proposal

Weezevent - Revised Project Proposal

Background

Launched in France in 2008 by 2 students, Weezevent initially started off as a self service digital ticketing platform that allowed event organizers to sell tickets online, countering the need to go through old-school 3rd party distributors that gathered too much data and offered no customization. From 2010 to 2014, Weezevent experienced exponential growth, expanding their offering and markets, all the while receiving awards for Entrepreneurship achievement (such as the Deloitte Fast 500 award for Europe and the Middle East). In 2014, Weezevent expanded its market footprint by opening Weezevent Canada, a satellite office hoping to conquer the Canadian event industry.

As of today, Weezevent's portfolio is now composed of four product offerings:

- WeezTicket, the digital ticketing platform;
- WeezAccess, the access control technology for larger gatherings;
- WeezPay, the cashless RFID offering;
- WeezTarget, the CRM and Marketing app for events.

The scope of this project will focus specifically on Weezevent Canada, and its Large Scale Event clientele and business development processes. Weezevent Canada's core mandate is to grow business demand and expand market footprint across the country. We have outlined several systems and subsystems that make up this integral business process (see annex for detailed flowchart):

Develop Business:

- **Identify opportunity**: define market segments, client targets and targeted messaging;
- **Qualify leads**: define lead qualification and contact qualification elements, create qualifying questions and scripts;
- **Nurture leads**: Generate new leads list or create/execute new leads acquisition campaign, Define Discovery questions and Pain probing questions;
- **Approach lead**: Make first contact with lead, set client appointment and determine initial buyer interest;

Process Event:

- **Present to lead**: Actively demonstrate how the products meet the needs of the potential customer, and actively listen to the customer needs;
- **Handle objections**: Listen to lead's concerns and address them;
- **Sign paperwork:** Send, negotiate and sign proposal, contract and quote.

Engage Customer:

- Post-event Customer Engagement

<u>Processes not included in the project</u>

- Develop Product
- Operate Event

<u>Contact for interviews</u>

Julien Desrosiers, Weezevent Canada Country Manager
T : (514) 419-2666
M : (514) 574-2675
@:Julien.desrosiers@weezevent.com

Appendix 5 - Interview and Observations Minutes

Interview questions

Weezevents

- Is there a typical customer journey at Weevents? Or their experience and interactions with your staff varies a lot depending on the product they choose?
- Is there a product that has less success that others? If yes, do you know the reason why?
- Do you have any major struggles at the moment regarding a product or an internal process?

Questions for proposal:

Background

- How long in business? How long in Canada?
- How many employees? In Canada? Worldwide?
- Types of clients? Typical clients using the self service platform in Canada?
- Types of events?

Founded by 2 event organizers in France. Sport events. In 2006, Eventbrite was just launching. In France, no self service ticketing platform. Distributors in brick and mortar locations, but no control over the image (customization, module to website), control marketing and data. Distributors use data from events to sell platforms to other clients. Idea was to control everything. Launched in 2008 in France. 2010-1014: exponential growth, Deloitte 500 for Europe/Middle East. 2014, Canada soft launch in CA. 2015: Julien joins team. Develop market in QC and Canada (Ontario)

Bought Cashless solution, launched CRM app (to communicate). 4 apps.

6 countries: Canada. Belgium, Suisse, Uk, Spain, France

Canada teams:

- Covid: furlow.
- Before Covid: still an office for representation. Salesman and CSM (customer success manager)
- No development, no coding.
- Canada: selling and support office.
- 4 people: accountant, salesman, CSM, partner (part time as salesman)
- Before covide: 2 salesman, marketing manager (working with marketing france)

Customer acquisition:

- Inbound/Outbound: Role
    - Different types of events
- Inbound: 30%. Mainly individuals. They come on their own. No CSM assigned. Want to be autonomous. Simple, easy to use.
    - SEO, Marketing ads

- Outbound: 70%, call potential leads. Hubspot for CRM. Move them through the CRM. Mass marketing email.
    - Larger organizer: Everyone needs to be autonomous. Need support from CSM, with specifics like calculating ROI on ads, Cashless, RFID
    - How do you select leads?
        - Top down analysis: start with what is the most profitables: Festivals, then by technology, by pain points

- Large organizer finding website: Over 2000 attendees, salesman responding. Under that, a CSM answers.

- Used to have salesmen specialized in one area. Now removed.

<u>Preliminary list of major processes</u>

- 2-3 biggest business systems and descriptions
    - Processes?

- Lead generation (marketing)
- Sales conversion
- Operations
    - What makes a brand popular is their big ticket events. Operation is important.
    - Sales, Cashless, Scanning
    - Largest part. Most critical part. We don't want failure in event operations.
    - Operations failure: had to remove a cashless and open bar.
        - Crisis management: Not well defined.
        - Training: Much training. How knowledge is transferred is important, to volunteers and staffers
        - Inventory management: sometimes, 2000 devices all worth 500-600$
        - Safety: responsible during events.
        - Shipping: team of 3 people that ships devices.
        - Updates: constant updates
        - Software: developed software to track all devices.
            - Managed devices on event, with log in, transactions, GPS
            - Marketplace: free ticket marketplace.

<u>Processes not included in the project</u>

- Any other business processes?

<u>Contact for interviews</u>

Julien Desrosiers

When entering a new market: value of staying local.

1. Ask about current weezevent docs (flowcharts, DFD, or other)
2. Go over questions (above)
3. Show us the current flow, from A to Z, with a dummy client? Find lead, Develop business, Operate event

October 12th, 2020 (3rd meeting with Julien)

DFD Questions:

Develop Business:

1. **Generate Lead**: How do you create/find contact information for each lead?
    a. Different ways of finding them, either through websites. Most of them will come through a form. Take down info on the first call. Background, what they do, what they like. What type of product? What are they interested in? They also find contact info on linkedin or in the event registry of quebec (members might have info there).
    b. How do they scope out the leads? They use Bonjourquebec.com and evenementsattractions.quebec both of these are registries with all the events going on in the province of QC. all cultural events are registered as ATR, all these events are in the same registry.
        i. Data scraping, they use something called "fiver?" freelancers that scrape all the data and narrow it down for them. They try and do this each week.
2. What happens with a dead lead? (a lead that declined)
    a. When a lead is declined, they try to understand why, sometimes this could be hard because they don't want to give much info, it could also be price related. First they try to understand why. Every lead that is lost is put in a category on CRM with the reason why they lost that lead. Ex: someone has a three year plan with someone else, they ask if they could call them when the contract is over. A lead is never lost, they periodically go over their lost leads to see if there is a task related to them + to seek interest
3. When a lead is converted, is it deleted from the lead list or it's simply an opportunity/ customer that is created?
    a. A lead is lost, it goes in a "Lost" category, same thing when it is won. They always attach a task to it even if the lead is won.
4. How do you schedule meetings with the clients? Agenda booking link or old school?
    a. Old school majority of the time or discussion by email - negotiation loop
5. Is there a process to remove a lead from its data store & move it to the "official client" data store?

    a. When a lead enters the crm it might then be split in opportunities related to the product line, it still stays in the hub spot? But the system might create a file in google drive. Hub spot creates the company,the deal, the contact. When its outbound, julien creates it himself.
6. What is the payment procedure once a client has signed the contract? (order flow payment) Do you wait for the customer to pay the invoice to go through with the operation process? Full payment is received upon signing?
    a. They have a tool called Quickbook and they send a quote, once its approved its an invoice. For an event, they might ask the payment before or after. If its ticketing, they take commission off tickets directly. It could be 50% before and 50% after
7. How are invoices stored? You keep them within the sales dept or it is usually not part of your processes and accounting is taking care of them all?
    a. All of the quotes are created by the sales manager. Once transformed to invoice it is automatically stored in quickbooks. **DS**
8. Regarding the inbound leads, the results of the form you are receiving, how are they treated/verified?
    a. Message, from the person filling form telling them what they need.
    b. Checkbox, making sure they are event planners and not ticket purchasers
    c. Analytics, what page has been viewed before filling out form, and where its from, google fb,
    d. Smaller will only use self service ticketing, might transfer them to support, people answering basic questions, no sales pitch, only support, no data flow her
9. In terms of classification: When do you start speaking of an event or when do you have an event entity that is mentioned in your CRM ?
    a. Do you contact events or event organizers.
    b. In terms of outbound, they contact the company first, then they talk about events and their events show up as "deals" in the hub spot.
    c. Might start with company, cause its company wide deal, then will break it down by event because each event has their own needs.

Operate Events:

10. Rental vs ordering process (equipment)

11. Post event process (feedback, deposit return, damage costs, etc.)
12. After the proposal, the client needs to sign it before producing any invoice?
13. After a proposal is created is there an opportunity for the client to ask for an alternative product?
14. What's the output of the spotting session? What does it result in? Are there any deliverables produced/sent?
15. Is the Reporting something of interest? Would you like us to focus on this?
16. What is the most important: Inbound/Outbound

1. Is the process between renting and ordering equipment different?

Yes, Weezevent doesn't sell equipment anymore. The customer has 2 options, he can use his own device with a free app (ticketing / access control) or he rent our devices (access control / ticketing and cashless)
The customer must give us his needs, we often help defining those needs and quantities, we do a device booking for the dates of the event + pre-prod in a proprietary system. Finally, the customer will need to sign a document when he receives the devices and then during the event volunteers, employees or third-party contractors will also sign individual releases when they take possession of a device.

1. After a proposal is created is there an opportunity for the client to ask for an alternative product?

Yes, but the salesperson must create a new deal and proposal for that product.

1. If the CSM perform an upsell, the quotation and invoice system work the same way as the first time?(once quote is approved, invoice is automatically produced)

Usually, the process is shortened, we skip the quote, but for big organizations their internal rules might require a quote every time something is added.

1. Do you follow a procedure during the spotting session? What does it result in? Are there any deliverables produced/sent?

We walk the site / venue with the customer's project manager and we identify every part of the contract on the site.We need to look at the site configuration, wi-fi availability and strength, security of us and equipment, etc. We verify that anything related to our part of the gig is prepared by the construction team as it was described to us. For example, if there is access control we identify every entrance and access and verify they are as described by the customers when planning the project and that the wi-fi will be working properly. Right now nothing is produced or sent by us to the customer after it's done, and honestly maybe it should be. What we do is give a verbal approval or try to change our configuration to adapt

to the reality or we might also let the customer know that in the conditions we won't be able to do it.

1. Is the Reporting something of interest? Would you like us to focus on this?

Reporting is important. In business development, we report our successes and failures to the management. Also, I think something often disregarded in many organizations is the relationship between marketing and sales, they need to talk to each other and one way to do it is reporting. For example, Hubspot gives us reports of deals won and what was the origin of that deal and type of customers, this is the kind of insight marketing might need.

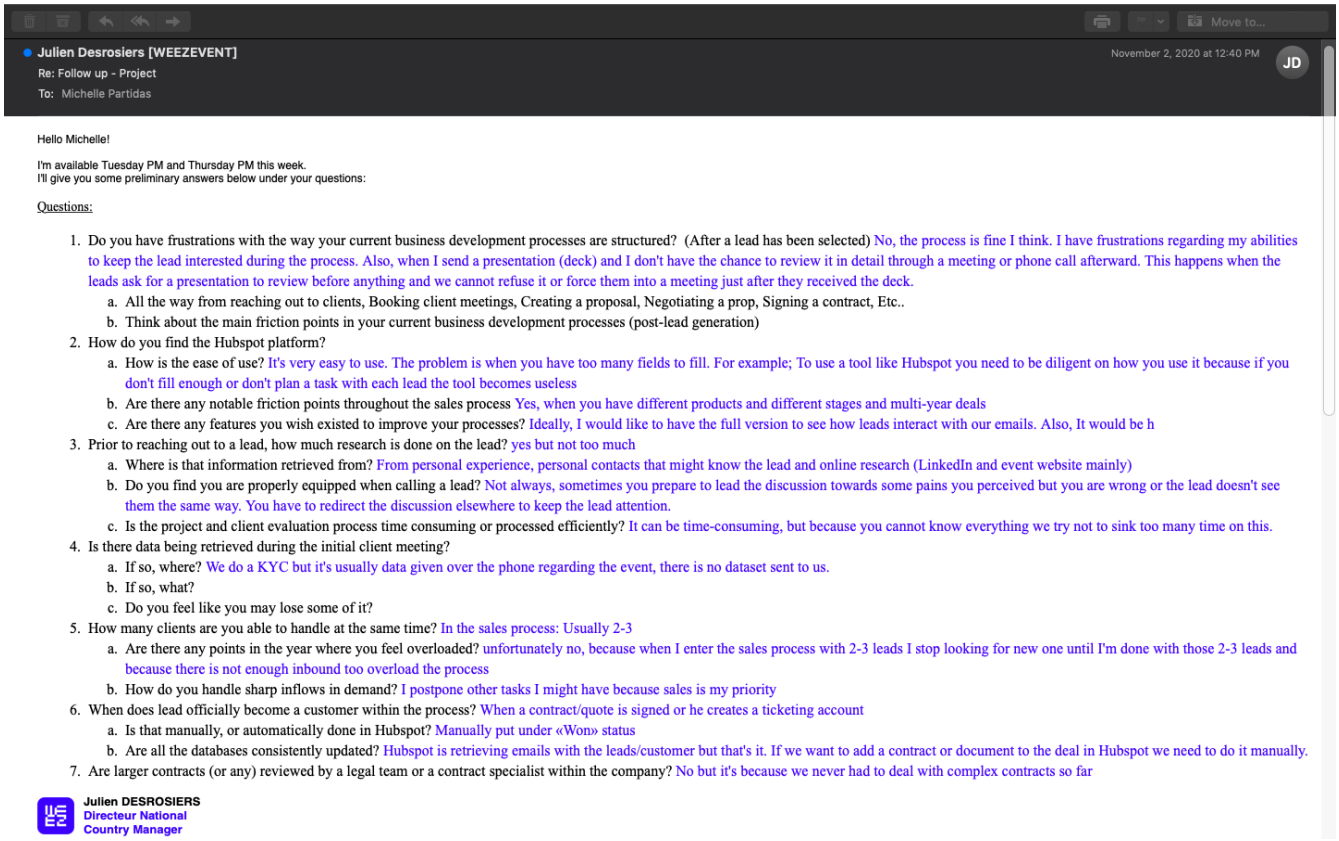
We also report directly to the customers during and after the event through automated reports, live data and graph and custom KPIs. But we don't formally write a report on our «operate event» activities, it's more a feedback on what works well and what didn't and how we could do better next time.

1. What activities take place following an event? Ex: do you fill a form for feedback, deposit return, damage costs, etc.

After an event we have to retrieve all our devices, clean them and see if anything has been damaged. We might also invoice the customer for additional devices, time or consumables that we required during the event.
We try to talk or email the customer after the event to chat about what happened and what could have been done differently. Some customers might ask for a written report but this is often not the case. Usually after the event if we have all the devices not much happens, the discussion will start again when we start the next edition and we will reflect on the previous edition (sometimes with confusion because we might have forget some informations)

1. Ask about current weezevent docs (flowcharts, DFD, or other)
2. Go over questions (above)
3. Show us the current flow, from A to Z, with a dummy client? Find lead, Develop business, Operate event

Appendix 6 - Documents Collected



Julien Desrosiers [WEEZEVENT]
Re: Follow up - Project
To: Michelle Partidas

November 2, 2020 at 12:40 PM

JD

Hello Michelle!

I'm available Tuesday PM and Thursday PM this week.
I'll give you some preliminary answers below under your questions:

Questions:

1. Do you have frustrations with the way your current business development processes are structured? (After a lead has been selected) No, the process is fine I think. I have frustrations regarding my abilities to keep the lead interested during the process. Also, when I send a presentation (deck) and I don't have the chance to review it in detail through a meeting or phone call afterward. This happens when the leads ask for a presentation to review before anything and we cannot refuse it or force them into a meeting just after they received the deck.
    a. All the way from reaching out to clients, Booking client meetings, Creating a proposal, Negotiating a prop, Signing a contract, Etc..
    b. Think about the main friction points in your current business development processes (post-lead generation)
2. How do you find the Hubspot platform?
    a. How is the ease of use? It's very easy to use. The problem is when you have too many fields to fill. For example; To use a tool like Hubspot you need to be diligent on how you use it because if you don't fill enough or don't plan a task with each lead the tool becomes useless
    b. Are there any notable friction points throughout the sales process Yes, when you have different products and different stages and multi-year deals
    c. Are there any features you wish existed to improve your processes? Ideally, I would like to have the full version to see how leads interact with our emails. Also, It would be h
3. Prior to reaching out to a lead, how much research is done on the lead? yes but not too much
    a. Where is that information retrieved from? From personal experience, personal contacts that might know the lead and online research (LinkedIn and event website mainly)
    b. Do you find you are properly equipped when calling a lead? Not always, sometimes you prepare to lead the discussion towards some pains you perceived but you are wrong or the lead doesn't see them the same way. You have to redirect the discussion elsewhere to keep the lead attention.
    c. Is the project and client evaluation process time consuming or processed efficiently? It can be time-consuming, but because you cannot know everything we try not to sink too many time on this.
4. Is there data being retrieved during the initial client meeting?
    a. If so, where? We do a KYC but it's usually data given over the phone regarding the event, there is no dataset sent to us.
    b. If so, what?
    c. Do you feel like you may lose some of it?
5. How many clients are you able to handle at the same time? In the sales process: Usually 2-3
    a. Are there any points in the year where you feel overloaded? unfortunately no, because when I enter the sales process with 2-3 leads I stop looking for new one until I'm done with those 2-3 leads and because there is not enough inbound too overload the process
    b. How do you handle sharp inflows in demand? I postpone other tasks I might have because sales is my priority
6. When does lead officially become a customer within the process? When a contract/quote is signed or he creates a ticketing account
    a. Is that manually, or automatically done in Hubspot? Manually put under «Won» status
    b. Are all the databases consistently updated? Hubspot is retrieving emails with the leads/customer but that's it. If we want to add a contract or document to the deal in Hubspot we need to do it manually.
7. Are larger contracts (or any) reviewed by a legal team or a contract specialist within the company? No but it's because we never had to deal with complex contracts so far

Julien DESROSIERS
Directeur National
Country Manager

Julien Desrosiers [WEEZEVENT] Thursday, Nov 26, 02:52 PM

› To: Simon Bel

Salut Simon,
non ça ne me dit rien ce courriel. Voici mes réponses:

Not exactly, if we go back to when a deal is closed in Hubspot by the salesperson, first it must be sort as is in Hubspot and then the customer must now be transferred to the best customer success manager (CSM) for the type of event
Sometimes, the salesperson might discuss with the CSM team leader if he isn't sure who could take that customer. An introductory email is sent and then a call is planned to introduce the CSM to the customer. If it's a match, the salesperson will be assigning the deal to the CSM in Hubspot, and he will also plan a task for a date before the end of the contract if he knows when it is otherwise this will be left to the CSM.

Then as soon as a CSM starts working with a customer he will be inviting him to create an account on weezevent.com. The monthly newsletter is sent to all customers with an account. All accounts are always active even if there are no activities for a while in the account (if he doesn't sell tickets or use cashless for a while).
It is now the job of the CSM to keep his customers engaged in between his events and some customer only have an event once a year. The CSM use an Excel file to track the yearly journey of their customers with deadlines and all sort of things, it is not the best tool and we are not using here in Canada this is a growing flaw we have because we have more and more customers and it is not possible anymore to remember everything and keep track of everyone. I know there is a plan to transfer that to hubspot.

You are right it is the marketing team that is sending the newsletter to our customers. We are right now working on the segmentation of our customers so we can adapt the newsletter to their specific needs and interests. They can always unsubscribe. A newsletter is a small part of the «engage customer» process, we also try to keep in touch with them on any occasion we can, engage in discussion /brainstorm with them, meet them in tradeshows, invite them to events that might inspire them, send holiday gifts, etc.

Attached:
- Presentation slides :

00_UK_Weez_Master.pdf

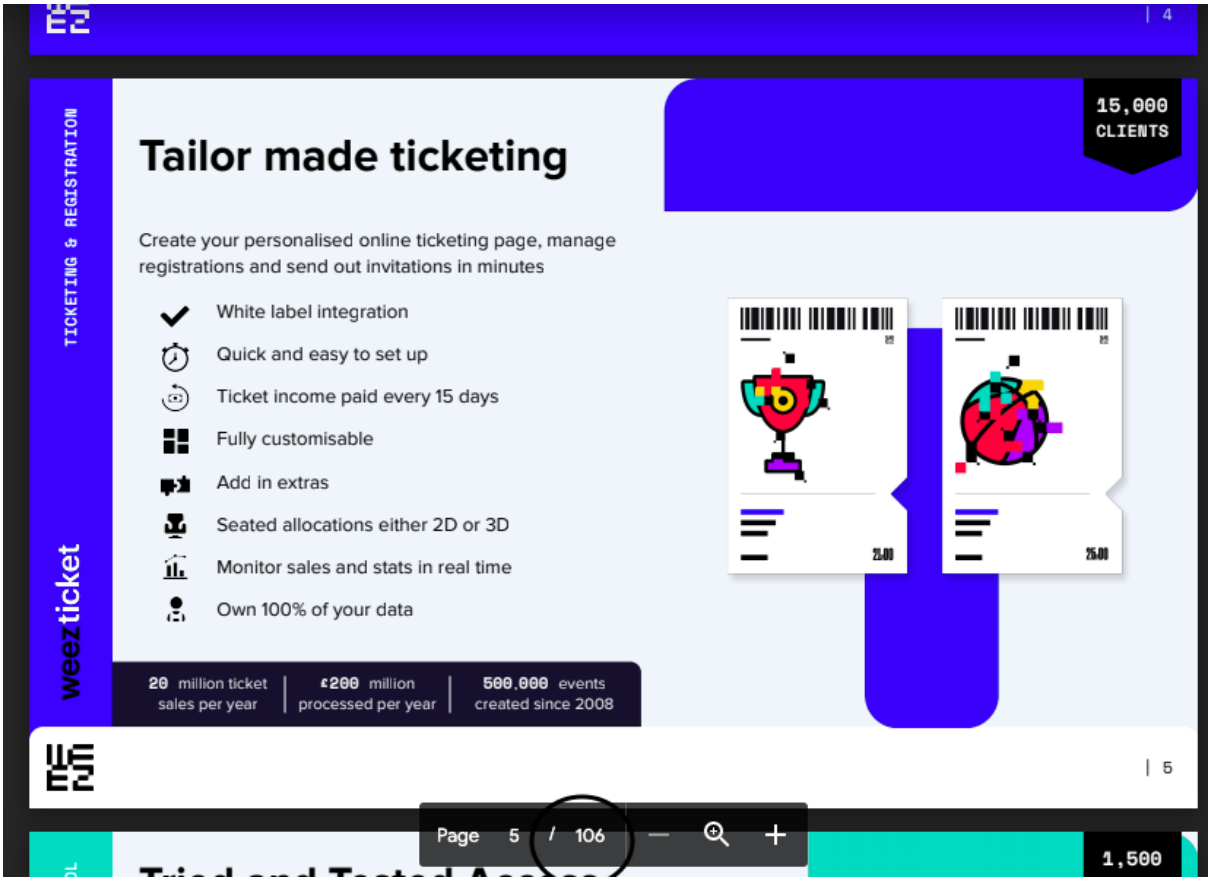
we always adapt it to the customer needs we identified in the first meeting

-September and October newsletter
Usually, the newsletter includes news on the product, a new piece of content from the blog, and some local references.

The questions asked during the first call are adapted to the customer and the product he is looking for so it's not a «script». But there are basic questions that are often asked:

- Can you tell me more about your event, your mission, your values, etc.
- Can you explain what is your role in the organization of the event?
- Can you describe your different segments or your typical customer?
- What do you expect to change for the next edition, will you add some new elements we might not know of?
- What do you use for «insert product» right now?
- What are your actual pain points?
- What are your needs?
- How do you think Weezevent can help you?
- Have you thought about «other product»?

Julien DESROSIERS
Directeur National
Country Manager



Appendix 7 - Team Contract

BTM 481 Contract - Team 2

1. **Meeting Coordinates**
    - Location: Zoom Meeting
    - Day: Friday
    - Time: 10:00 AM EST
    - Duration: 3 hours
    - Additionally on Friday, we will meet once a week with the professor, from 2pm to 2:30pm.
    - If any other meetings are required within the scope of the project, the team will find an appropriate time slot during the following weekend.

2. **Responsibilities**

2.1. Team Leader

- Leader assignment:
  - Leaders will be assigned weekly, on a rotational basis. See leaders per week below:

- Week 1: Arnaud
- Week 2: Michelle
- Week 3: Michael
- Week 4: Jonathan
- Week 5: Simon
- Week 6: Cédric
- Week 7: Arnaud
- Week 8: Michelle
- Week 9: Michael
- Week 10: Jonathan
- Week 11: Simon
- Week 12: Cédric
- Week 13: Arnaud

- Responsibilities and rights:
  - Managing the discussions
  - Managing time and schedule
  - Managing project tasks
  - Approval of Meeting minutes document for current week
- Consequences of failure to carry out responsibilities will see him deducted 10% off of his final peer evaluation assessment.

2.2. Scribes (Secretary)

- Secretary assignment
- 2 Scribes will be assigned weekly, on a rotational basis. See scribes per week below:

- Week 1: Arnaud and Michelle
- Week 2: Simon and Michael
- Week 3: Jonathan and Cédric
- Week 4: Arnaud and Simon
- Week 5: Michelle and Cédric
- Week 6: Michael and Jonathan
- Week 7: Arnaud and Cédric
- Week 8: Simon and Michelle
- Week 9: Simon and Michael
- Week 10: Jonathan and Arnaud
- Week 11: Michael and Michelle
- Week 12: Cedric and Jonathan
- Week 13 Arnaud and Michelle

- Responsibilities of the scribes:
  - Preparing the agenda for the meeting
  - Taking notes during the meeting.
  - Complete Meeting minutes document
  - Organizing and sending the notes from a meeting in a minute's template

- Consequences of failure to carry out responsibilities will see him deducted 10% off of his final peer evaluation assessment.

2.3. Members

- Rights
  - Equal treatment
  - Majority vote
  - Provide feedback, express opinion, and get help from team members
- Responsibilities
  - Respect team members and majority's decision
  - Being punctual
  - Follow contract rules
  - Complete tasks on time
  - Consequences of failure to carry out responsibilities will see him deducted 10% off of his final peer evaluation assessment.

3. Performance Expectations at Team Meetings

3.1. Attendance and Punctuality

- Attendance will be defined as follows: presence during online meetings (Zoom). Team members must be present at 80% or more of all meetings.
- Valid reasons for absences: class conflict, technical connectivity, religious purposes.
- Time/day for advance notice of absence before the meeting date: the absentee will notify the rest of the team a minimum of 2 hours in advance.
- Maximum number of absences allowed with prior notification: the absentee will be allowed a maximum of 2 absences without prior notification.
- Consequences for unacceptable/unexcused absences: 10% deduction off peer evaluation
- An absence, whether it is excused or not, should not be a reason not to perform the task the team member has agreed to take on. The absentee should do his best to inform the team of his work despite his absence during the meeting.
- Define lateness: a member will be considered as late if he arrives at a group meeting 20 or more minutes late.
- Consequences for repeated lateness: 10% deduction off peer evaluation (lack of commitment)

3.2. Participation in Discussions and Task Handling:

- Well-managed collaboration
- Sufficient preparation
- Meeting agreed upon deadlines
- Asking other members for help and providing help when asked
- Consequences of failure in taking responsibility of project tasks and/or completing them
- Basis of assessment for the member's work quality
- Consequences of failure to carry out responsibilities will see him deducted 10% off of his final peer evaluation assessment.

4. Communication Media:

- Team calls will be done via Zoom.
- All email related to project work will be forwarded to the entire team for transparency purposes.
- All project-related files will be stored in a shared Google Drive.
- Files will be available for modifications by all team members.

5. Guidelines to Improve Meeting Effectiveness:

- Giving structured feedback to team members during and the end of the project
- Demonstrating flexibility, responsibility, and motivation
- Managing differences of opinion and conflicts among members
- Consequences of domineering behaviour and non-constructive criticisms

Date of Signature: 09/14/2020

Name	Signature
Simon BEL	
Arnaud LESUR	
Michelle PARTIDAS	
Michael SHATAWY	
Jonathan TARTAGLIA	
Cédric PISIER CAILLET	

Appendix 8 - Meeting Minutes

Meeting 1 - Meeting Minutes, 1st Meeting - 10/09

Date:	Thursday, September 10th
Start time:	3:00 PM
End time:	1.5 hours
Location:	Zoom meeting
Leader:	N/A
Scribe:	Arnaud Lesur
Attendance:	5/6

Agenda

I. Client selection criterias
   1. Discussion
   2. Criteria selection

II. Potential company brainstorm

1. List Creation (Shared document)
2. Discussion

Required Materials and files:

Live access to Google drive shared folder.

Minutes

- Introduction

  Greetings

- Issues/Items Discussed

  See lists of items on the document "Potential Companies"

- Decisions
  - *Client Criteria selection:*
    - *Clients must have accumulated at least 3 years of operations.*
  - *Weekly meeting will be held on Thursday's, from 3 to 6pm on Zoom*
  - *Team communication will be organized and saved on a shared Google Drive document. All project documents will be accessible by all members at all times.*
  - *Weekly rotation of team leader and scribes, refer to Team contract*
- Tasks Assigned
  - *All members: Find other potential clients, comment on our preferences using the Google doc comment feature to narrow down options.*

- Date, Time, and Location of the Next Meeting

Thursday, September 17th, 2020. 3:00 PM EST on Zoom.

Meeting 2 - Meeting Minutes - 17/09

Date:	Thursday, September 17th
Start time:	3:00 PM
End time:	3 hours
Location:	Zoom meeting
Leader:	N/A
Scribe:	Simon Bel
Attendance:	Michelle Simon Arnaud

	Jonathan Cedric Michael

Agenda

1. Find companies and work on the tracker, synthesis of our outreach in a common document.
1. Discussing proposals

Required Materials and files:

Live access to Google drive shared folder.

Minutes

- Introduction

- Issues/Items Discussed
    - *Proposal Template:*
        - *Deliverables: 2-3 Project Proposals per team*
            A. *One-paragraph background of the potential client including how long they have been in business, how many employees they have, their level of interest in the project, etc.*
            B. *Preliminary list 2-3 major of business processes (sub-systems) and their brief descriptions*
            C. *Preliminary list of processes within each of the sub-systems*
            D. *A list of other major business processes in the organization that will not be included within the scope of your project (this is necessary if the scope of the project needs to be modified later on)*
            E. *Preliminary list of contact for subsequent interviews*
        - *Please do not exceed 1 page per proposal. It needs to be a quick snapshot and not an essay.*
    - Outreach tracker (list of companies we reached out to): here
        - *List was created*
        - *Companies were discussed*
        - *Awaiting responses*
- Decisions

- Tasks Assigned
    - ➔ Michelle: Contact CRUEL
    - ➔ Arnaud:
    - ➔ Jonathan: Contact the Montreal English School Board + restaurant La Serenata

- ➔ Simon:
- ➔ Michael:Reach out to D3
- ➔ Cedric: reach out to clinique go

- Date, Time, and Location of the Next Meeting

Thursday, September 24th, 2020. 3:00 PM EST on Zoom.

Meeting 3 - Meeting Minutes - 25/09

Date:	Friday, September 25th
Start time:	10:00 AM
End time:	12:00(2 hours)
Location:	Zoom meeting
Leader:	Michael
Scribe:	Jonathan & Cedric
Attendance:	Micheal Arnaud Jonathan Michelle Simon Cedric(1 hour late)

Agenda

1. Finalize the choice of 3 potential clients
2 .Start writing proposals 3. Book the first meeting with possible clients.(Booked during our team meeting) 4.Try to obtain data from the client (Obtain during the meeting) 5. Prepare questions for the interview(Prepared before the meeting)

Required Materials and files:

Live access to Google drive shared folder.

Minutes

- Introduction

Feedback from clients about potential partnership (refer to outreach tracker) and discuss proposals for each client chosen. Meet with clients, discuss everything to do with the company, discuss the sub-processes. Conclude the proposal to present to the teacher.

- Issues/Items Discussed
    - *Proposal Template:*
        - *Deliverables: 2-3 Project Proposals per team*
            A. *One-paragraph background of the potential client including how long they have been in business, how many employees they have, their level of interest in the project, etc.*
            B. *Preliminary list 2-3 major of business processes (sub-systems) and their brief descriptions*
            C. *Preliminary list of processes within each of the sub-systems*
            D. *A list of other major business processes in the organization that will not be included within the scope of your project (this is necessary if the scope of the project needs to be modified later on)*
            E. *Preliminary list of contact for subsequent interviews*
        - *Please do not exceed 1 page per proposal. It needs to be a quick snapshot and not an essay.*
        - Completed Proposal for Weezevents during this meeting (Presenting it to the teacher during our teacher meeting on Friday September 25th,2020 2:00pm)
    - Outreach tracker (list of companies we reached out to): here
        - *List was created*
        - *Companies were discussed*
        - *Awaiting responses*
        - Weezevents answered(Meeting booked for the 1st hour of this meeting)
    - Had a meeting with Julien From Weezevent
        - Focused what needed to be complete for the proposal
        - Talked about the background of the company
        - Discussed Sub-systems

- Decisions
    - Organize our thoughts from the meeting with Julien(Weezevent contact)
    - Discussed about the companies major processes and sub-systems
    - Finishing the proposal for Weezevents
- Tasks Assigned
    - ➔ Michelle:
    - ➔ Arnaud: Revise Weezevent Proposal with simon
    - ➔ Jonathan:
    - ➔ Simon: Revise Weezevent Proposal
    - ➔ Michael: Work on Proposal on diner
    - ➔ Cedric: Starting the Client letter

- Date, Time, and Location of the Next Meeting

Friday, October 2nd, 2020. 3:00 PM EST on Zoom.

Meeting 4 - Meeting Minutes - 25/09

Date:	Friday, October 2nd, 2020
Start time:	10:00 AM
End time:	
Location:	Zoom meeting
Leader:	Jonathan
Scribe:	Arnaud and Simon
Attendance:	Micheal Arnaud Jonathan Michelle Simon Cedric

Agenda

1. Finish Initial Letter to client 2. Final review of both proposal and initial letter before sending
3. Create client's DFD (lucid chart)

Required Materials and files:

Live access to Google drive shared folder.
Lucidchart link: Lucidchart:

Minutes

- Introduction

- Issues/Items Discussed
    - Initial letter is finalized. Do we need to send it along with the proposal as another document or it is the body of the email?
    - Proposal: confirmed.
    - We built a flowchart to help us map out the processes we chose, the result is not very academic but helps us to be on the same page.
- Decisions

- We don't have enough information to build the DFD as of now, we will need a meeting with Julien before being able to build it.
-

- Tasks Assigned
  - ➔ Michelle:
  - ➔ Arnaud:
  - ➔ Jonathan:
  - ➔ Simon:
  - ➔ Michael:
  - ➔ Cedric:
- Date, Time, and Location of the Next Meeting

Friday, October 9th, 2020. 3:00 PM EST on Zoom.

Meeting 5 - Meeting Minutes 09/10

Date:	Friday, October 9th, 2020
Start time:	12:15 PM
End time:	2:15 PM
Location:	Zoom Call
Leader:	Simon
Scribe:	Cedric Michelle

Attendance:	Arnaud Cedric Jonathan Michael (1st half of meeting) Michelle Simon

Agenda

I.	Attempt DFD - Combine everyone's rough draft DFD. - Ordering process - Dev. Business system processes
II.	Prepare questions for Julien for meeting at 2:00 PM (postponed to Monday Oct. 12 10:30 AM)

Required Materials and files:

Everyone's attempt (rough draft) at writing the DFD

Minutes

A. Introduction

- Greetings

B. Issues/Items Discussed

- Eliminate assumptions from DFD, rewrite info that is 100% sure
- Focus on Dev. Business on meeting with Julien
-

C. Decisions

- Contact someone from Weezevents who works in the supply chain department (for Operate Event process*)
-

D. Tasks Assigned

Finish Interview question for client meeting on Monday 12th.
Update DFD after meeting

E. Date, Time, and Location of the Next Meeting
October 16th, 2020 @ 10 AM EST on Zoom

Meeting 6 - Meeting Minutes 16/10

Date:	Friday, October 16th, 2020
Start time:	12:30 PM
End time:	3:00PM
Location:	Zoom Call
Leader:	Cedric
Scribe:	Michael Jonathan
Attendance:	Arnaud Cedric Jonathan Michael Michelle Simon

Agenda

I. Complete DFD using Juliens input - Develop Business - Operate Events
II. Start Pieces analysis

Required Materials and files:

Minutes

A. Introduction

- Greetings

B. Issues/Items Discussed

- Narrative review and update using Juliens input
- DFD modification based on input and feedback
- Operate Event infant stages of dicussicion
-

C. Decisions

- Improved DFD Development processes based on Julien(client) input
- Modifications made on the DFD based on classmates feedbacks
- Discussed the start of Operate Event DFD
- P.I.S.C.E.S started Discussion

D. Tasks Assigned

- Everyone: Look over the P.I.S.C.E.S documents/notes
- Everyone: Brianstorm Operate Event DFD

E. Date, Time, and Location of the Next Meeting

October 23rd, 2020 @ 10 AM EST on Zoom

Meeting 7 - Meeting Minutes (Week 8)

Date:	Friday, October 30th, 2020
Start time:	10:30 AM
End time:	12:30PM
Location:	Zoom Call
Leader:	Michael
Scribe:	Simon Michelle
Attendance:	Arnaud Cedric Jonathan Michael Michelle Simon

Agenda

1. PIECES
    a. Start PIECES
    b. Prepare Julien questions
2. Correct DFD with teacher's feedback

Required Materials and files:

Minutes

A. Introduction

Greetings

B. Issues/Items Discussed

In previous interviews, the client did not emphasize on current problems they are facing but simply tried to explain to us the daily operations. This is why the PIECES analysis is quite hard to build at the moment. We decided to look at our DFD and ask relevant questions on problems they could be facing.

C. Decisions

We decided to split the work in two different team(Simon and Arnaud on the DFD revision + Jonathan, Cédric, Michelle and Michael on the PIECES)

Results:

- DFD has been revised and broken down into 2 sub-systems.
- A list of 10 questions was created to guide us during the next interview with the client.

D. Tasks Assigned

- Michelle: Follow up with the client to schedule the meeting, let the team know.

E. Date, Time, and Location of the Next Meeting

- Most likely Sunday Nov. 1st with the client
- Next weekly meeting will be next friday, Nov 6th, at 10am.

Meeting 8 - Meeting Minutes (Week 9)

Date:	Friday, November 6th, 2020
Start time:	11:30 AM
End time:	1:30 PM

Location:	Zoom Call
Leader:	Jonathan
Scribe:	Simon Michael
Attendance:	Arnaud Cedric Jonathan Michael Michelle Simon

Agenda

I. Finish PIECES analysis

II. Start DFD for new subsystem with 5 processes (Customer engagement)

Required Materials and files:

Access to drive and Lucidchart

Minutes

A. Introduction

- Greetings

B. Issues/Items Discussed

- Reviewed PIECES draft and discussed each item
- Review DFD, adding new subsystem (customer engagement)
- Level DFD

C. Decisions

- Contact someone from Weezevents who works in the supply chain department (for Operate Event process*)
-

D. Tasks Assigned

E. Date, Time, and Location of the Next Meeting

Meeting 9 - Meeting Minutes, Meeting (Week 10)

Date:	Friday , Nov. 13th, 2020
Start time:	11:30 AM
End time:	1:30 PM
Location:	Zoom meeting
Leader:	Simon
Scribe:	Jonathan & Arnaud
Attendance:	Micheal Arnaud Jonathan Michelle Simon Cedric

Agenda

1. Finalize DFD Hierarchy - Done
2. Update and finalize DFD narrative (including subprocess 3)
3. Begin working on proposed DFD
4. Finalize PIECES - Done
5. Begin compiling project report
6. Email Julien with questions regarding subprocess 3 and hubspot SS.
7. Email Julien to know if he wants to assist to the presentation
8. Reserve time slot for D-day!

Required Materials and files:

Live access to Google drive shared folder.
Lucidchart link:

Minutes

- Introduction
  - Discussed Solution for PIECES
  - Narrative for Engaged in Customer DFD
  - Started discussing Project report
- Issues/Items Discussed
  - PIECES problems
  - Double check Context Level/Level 0/ Level 1 Engage in Customer
- Decisions
    - Ask prof on friday about presentation with client vs without client
- Tasks Assigned
  - ➔ Michelle: Update DFD based off PIECES
  - ➔ Arnaud: Hierarchies: Brief explanation of each section of the Project Report/ Update DFD based off PIECES
  - ➔ Jonathan: Brief explanation of each section of the Project Report
  - ➔ Simon: Updating Narrative
  - ➔ Michael: Updating Narrative
  - ➔ Cedric: Update DFD based off PIECES/Email Julien on question discussed
- Date, Time, and Location of the Next Meeting

  11:30am Friday, November 20th

Meeting 10 - Meeting Minutes, 11/20 (Week 11)

Date:	Friday , Nov. 20th, 2020
Start time:	11:00 AM
End time:	1:00 PM
Location:	Zoom meeting
Leader:	Cédric
Scribe:	Micheal & Michelle
Attendance:	Micheal

	Arnaud Jonathan Michelle Simon Cedric

Agenda

1. Review DFD narrative (including subprocess 3)
2. Create PIECES table 2
3. Continue working on proposed DFD
4. Continue compiling project report, split tasks
5. Follow up with Julien on last Email

Required Materials and files:

Live access to Google drive shared folder.
Lucidchart link:

Minutes

- Introduction
  - Greetings
  - Go over Agenda altogether

- Issues/Items Discussed
  - PIECES underlying problems solution in the DFD - Done, needs to be revised by the teacher this afternoon
  - Project outline, creation of master excel document to know what is done, to be done
  -
- Decisions
    - Ask prof on friday about presentation with client vs without client

- Date, Time, and Location of the Next Meeting

  11:30am Friday, November 27th

Meeting 11 - Meeting Minutes, Meeting - 11/20 (Week 12)

Date:	Friday , Nov. 27th, 2020
Start time:	10:00 AM

End time:	1:00 PM
Location:	Zoom meeting
Leader:	Arnaud
Scribe:	Cedric &
Attendance:	Micheal Arnaud Jonathan Michelle Simon Cedric

Agenda

1. Exam review
2. Presentation split
3. Progress review

Required Materials and files:

Live access to Google drive shared folder.
Lucidchart link:

Minutes

- Introduction
  - Greetings
  - Go over Agenda altogether

- Issues/Items Discussed
  - Study guide quiz 2
  -

- Decisions
    - Everyone makes the slides for the part they've worked on for the project

- Tasks Assigned
  - ➔ Michelle: Project report, slides
  - ➔ Arnaud: Project report, slides
  - ➔ Jonathan: Project report, slides
  - ➔ Simon: Project report, slides
  - ➔ Michael: Project report, slides

➔ Cedric: Project report, slides

- Date, Time, and Location of the Next Meeting

  10:00 am Friday, December 4th

Text should include:

Introduction of the section: what, how, why

Identify users' requirements

Discuss users' requirements

Highlight which requirements are mandatory and which ones are not (https://www.coleyconsulting.co.uk/require.htm)

Highlight functional vs. non-functional requirements (https://www.coleyconsulting.co.uk/require.htm)

Appendix: None required

Appendix 9 - Glossary of Terms

SYSTEMS APPROACH

- **Systems approach** is "the way of thinking about the job of managing. It provides a framework for visualizing internal and external environmental factors as an integrated whole. It allows recognition of the function of subsystems, as well as the complex suprasystems within which organizations must operate. Systems concepts foster a way of thinking, which, on the one hand, helps the manager to recognize the nature of complex problems and thereby to operate within the perceived environment. It is important to recognize the integrated nature of specific systems, including the fact that each system has both inputs and outputs and can be viewed as a self-contained unit. But it is also important to recognize that business systems are a part of larger systems—possibly industries, or even society as a whole. Further, business systems are in a constant state of change—they are created, operated, revised, and often eliminated."[30]

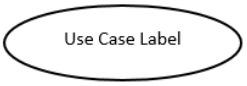
- A **system** is a collection of organized, interrelated, and interacting entities or ideas working together to achieve a common goal.

- The scope of the information system analyzed in the project is defined in terms of **system components** (subsystems, inputs, outputs, entities, interfaces, buffers, boundaries, feedback and control, and constraints).

USE CASE (OBJECT MODELING)

The use case tool emerges as the artificial separation between data and processes, the model captures the process and data by integrating them. It shows the interactions between the system and the external entities, and represents the collections of steps in the system function. The system and its external entities act as actors, they interact through the relationship lines used to initialize and communicate each function/goal by one of the actors. The relationships can also show dependency of each function on one another by connecting them with a line.

1. **Use Case** representing a function of the system, with steps

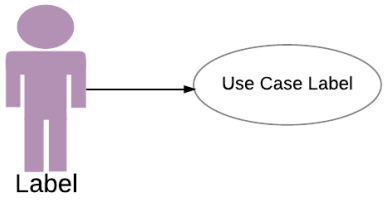


2. **Actor** represents a role something interacting with the system, then receive/send feedback to and from the system.

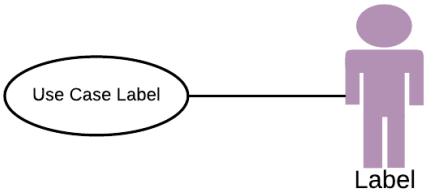
3. **Relationship**

[30] Kenneth Boulding, "General Systems Theory—the Skeleton of Science," Management Science 2 (3): p. 197, 1956.

- Initialize

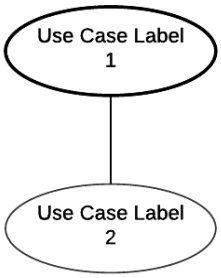


- Communicate



- Dependency

- Use case 2 depends on use case 1

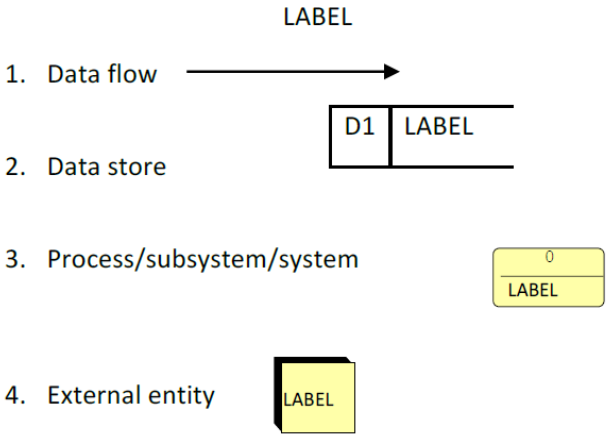


DFD (DATA FLOW DIAGRAM)

- A DFD is used as a communication tool between the systems analyst and the system user/owner to verify the accuracy of the system analyst's understanding of the current information system. It is also used as a representation of the system proposed by the systems analyst following the analysis of the current system and user requirements. The latter is used in designing the proposed system.

- A DFD is a graphic process modelling tool used to depict the flow of data as it travels from the external entities to an information system and passes through the system's processes and data stores.

- Four basic symbols are used in a DFD to represent its four components of DFD:



- There are two kinds of processes modelling: logical and physical. During the system analysis phase of systems development, logical process modelling is used to represent "what" information processing is done in the system without suggesting how the processes are carried out. During the design phase of system development, physical process modelling is used to represent "how" the information processing is done.

PIECES

- "**PIECES**" is a framework that is used to categorize the vast amount of information gathered during the systems analysis phase into problems, opportunities, and directives by the system owner. Each category addresses the need to correct or improve some aspect of the current information system. This aids the systems analyst in generating alternatives.

- "PIECES" is an acronym comprised of the first letter of each of the six categories of the framework:

P*erformance*

I*nformation* (and data)

E*conomics*, control costs, or increase profits

C*ontrol* or security

E*fficiency* of people and processes

S*ervice* to customers, suppliers, partners, employers…

- The categories of the PIECES framework are neither exhaustive nor mutually exclusive. The same problem/opportunity/directive may be classified in more than one category.

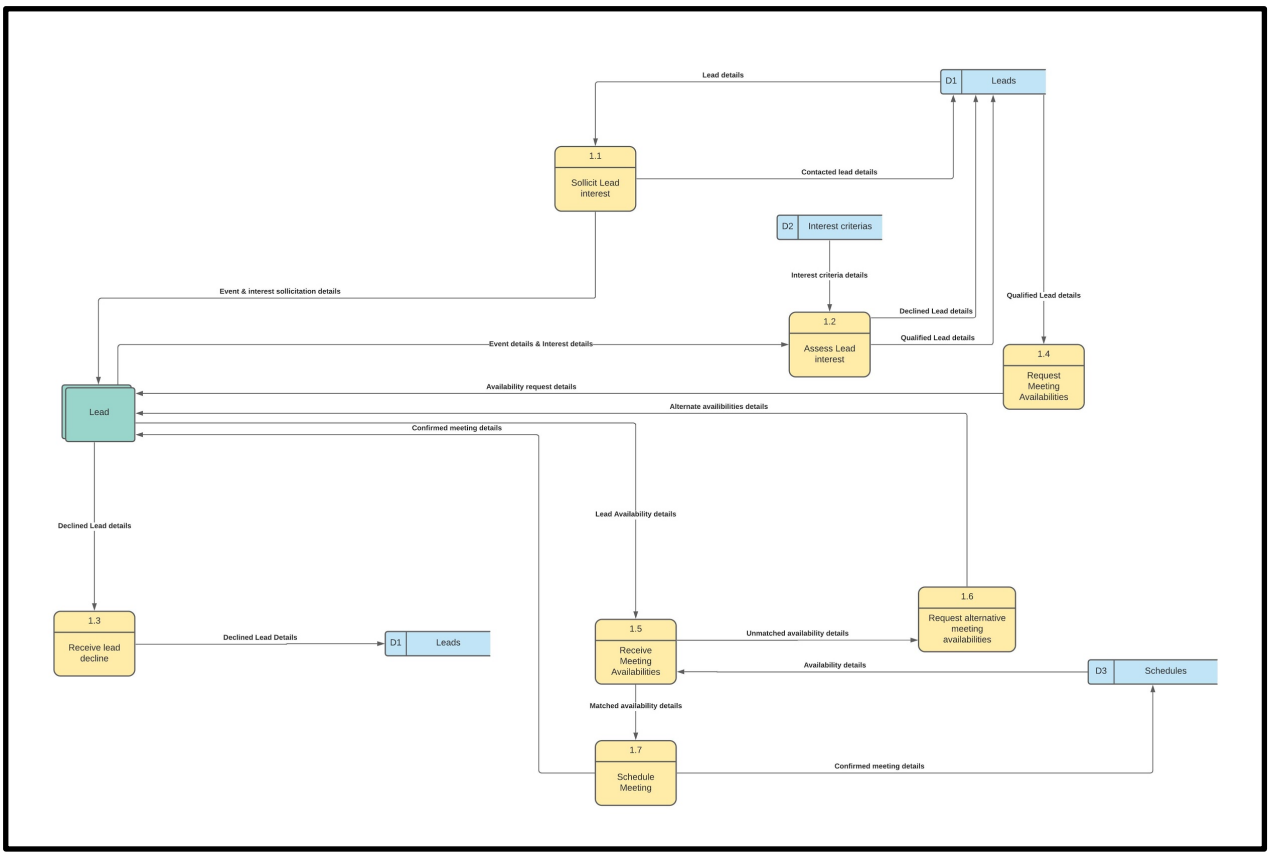
LOGIC DEFINITION TOOLS

- Logic definition tools are used to represent the logic inside a process of a DFD. It is used to supplement a process in a DFD when the logic is too complex and cannot be represented in sufficient detail otherwise.
- Only one kind of logic definition tool is used in this project:
- **Decision table**: "is a form of presentation that specifies a set of conditions and their corresponding actions"[31]. The conditions in a decision table correspond to the inputs to the process in the DFD. The actions in a decision table correspond to the outputs from the process in the DFD.
- Components of decision tables
    - Conditions (C): represent the "if" clause of the decision.
    - Actions (a): represent the "then" clause of the decision
    - Rules (R): represent the decision logic (condition/action combinations) within the process(s)

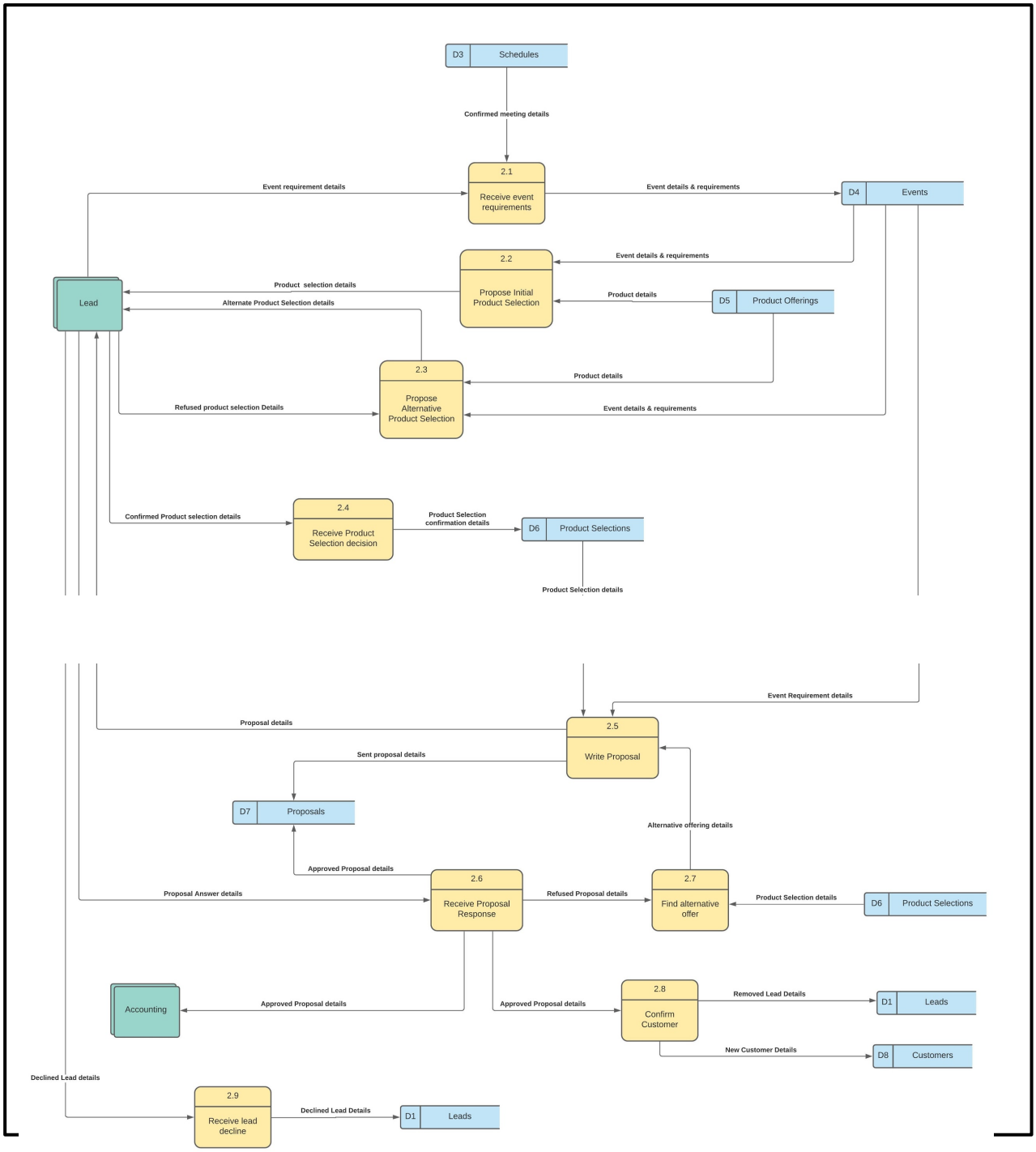
Appendix 10: Current DFDs

Subsystem 1: Develop Business

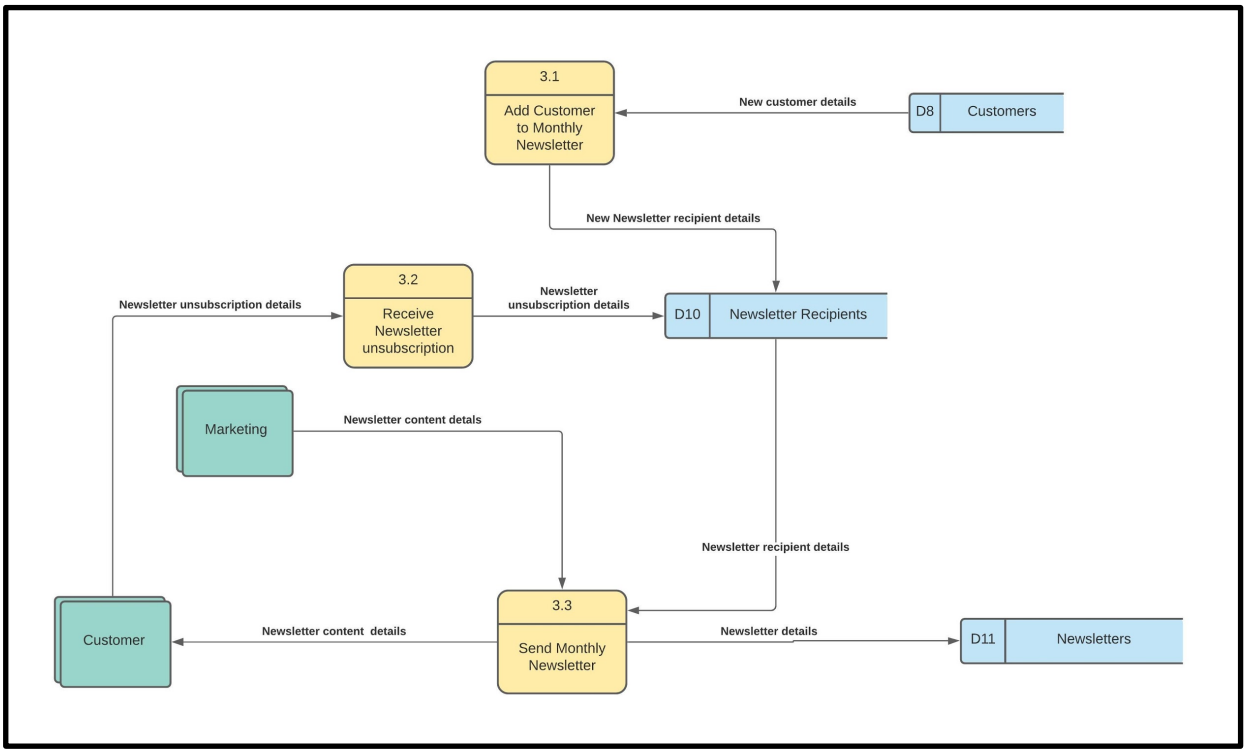
[31] Whitten & Bentley, Systems Analysis & Design Methods, McGraw Hill, 7th Edition, p. 357, 2006.



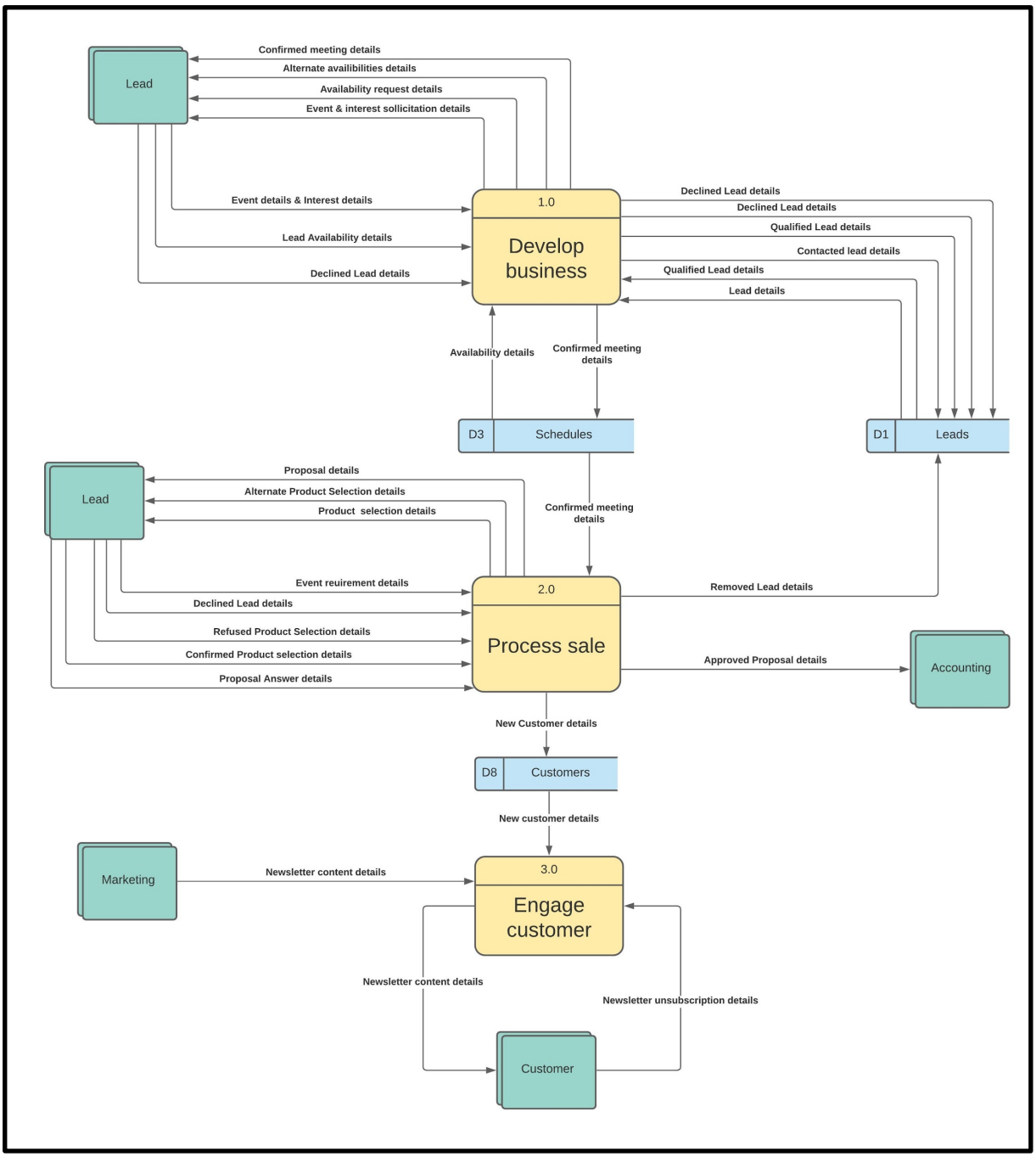
Subsystem 2: Process Sales


D3
Schedules
Confirmed meeting details
2.1
Receive event requirements
Event requirement details
Event details & requirements
D4
Events
2.2
Propose Initial Product Selection
Event details & requirements
Product selection details
Alternate Product Selection details
Product details
D5
Product Offerings
Lead
2.3
Propose Alternative Product Selection
Product details
Refused product selection Details
Event details & requirements
Confirmed Product selection details
2.4
Receive Product Selection decision
Product Selection confirmation details
D6
Product Selections
Product Selection details
Event Requirement details
Proposal details
2.5
Write Proposal
Sent proposal details
D7
Proposals
Alternative offering details
Approved Proposal details
2.6
Receive Proposal Response
Refused Proposal details
2.7
Find alternative offer
Product Selection details
D6
Product Selections
Proposal Answer details
Accounting
Approved Proposal details
Approved Proposal details
2.8
Confirm Customer
Removed Lead Details
D1
Leads
New Customer Details
D8
Customers
Declined Lead details
2.9
Receive lead decline
Declined Lead Details
D1
Leads

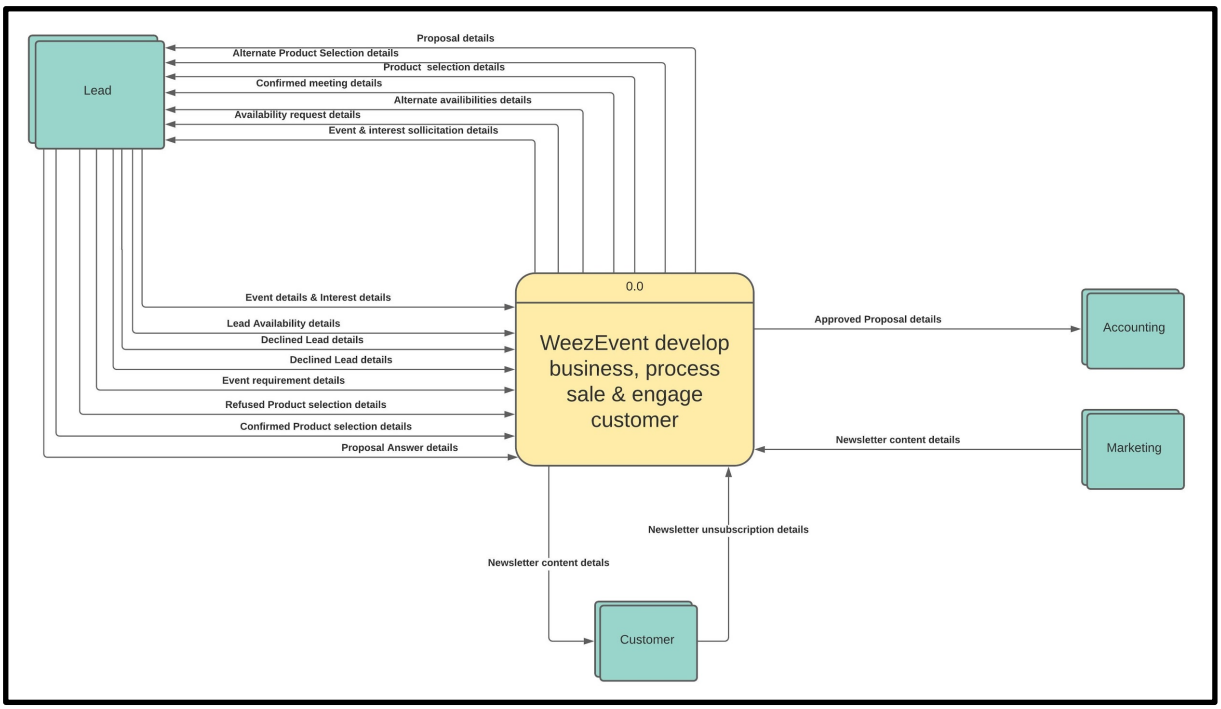
Subsystem 3: Engage Customer



Level-0

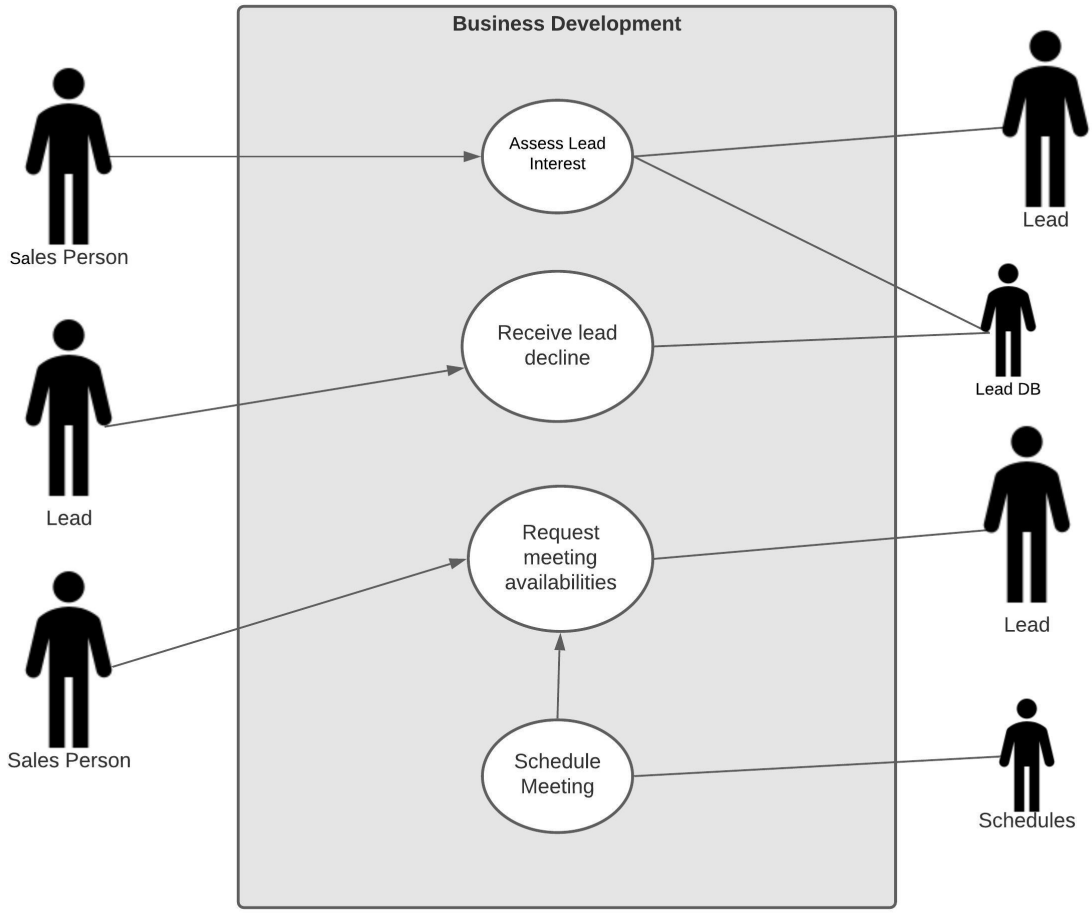


Context level

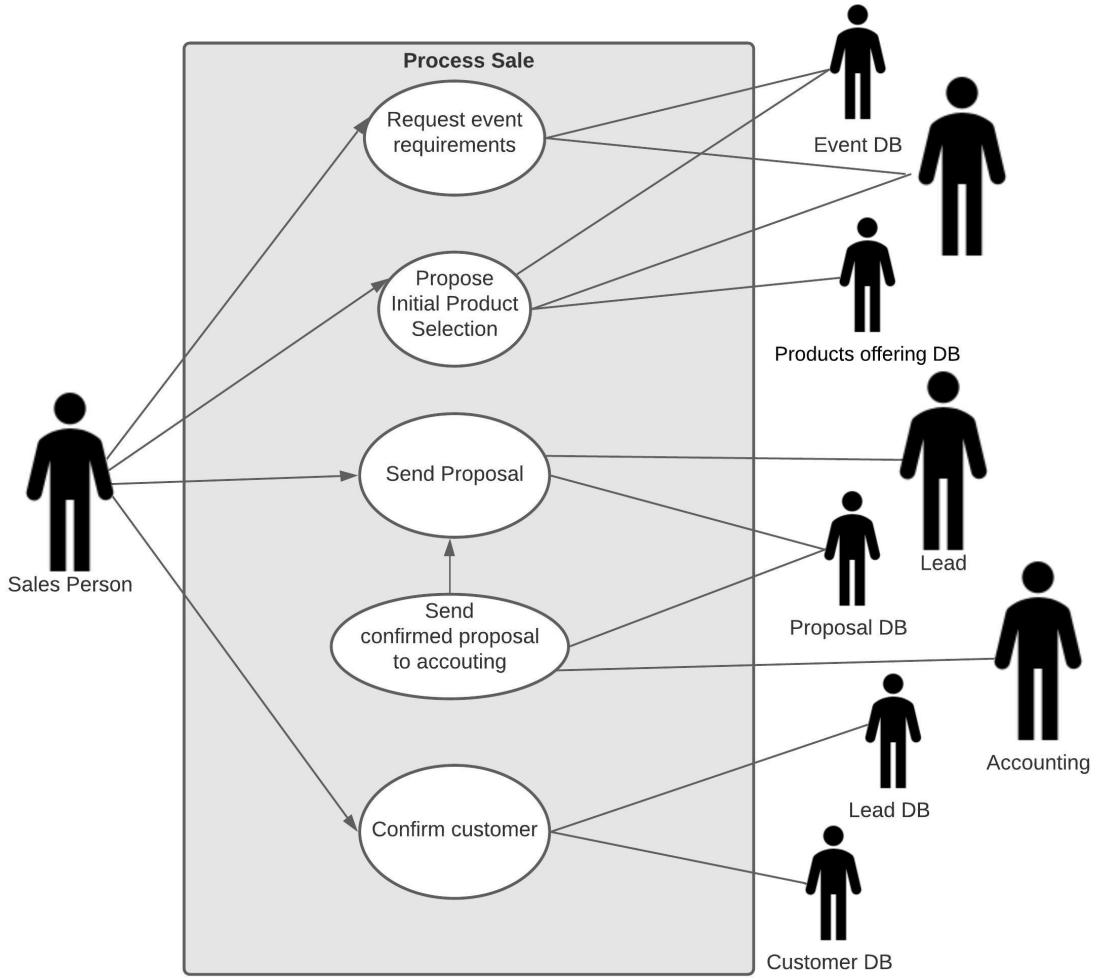


Appendix 11: Use Case

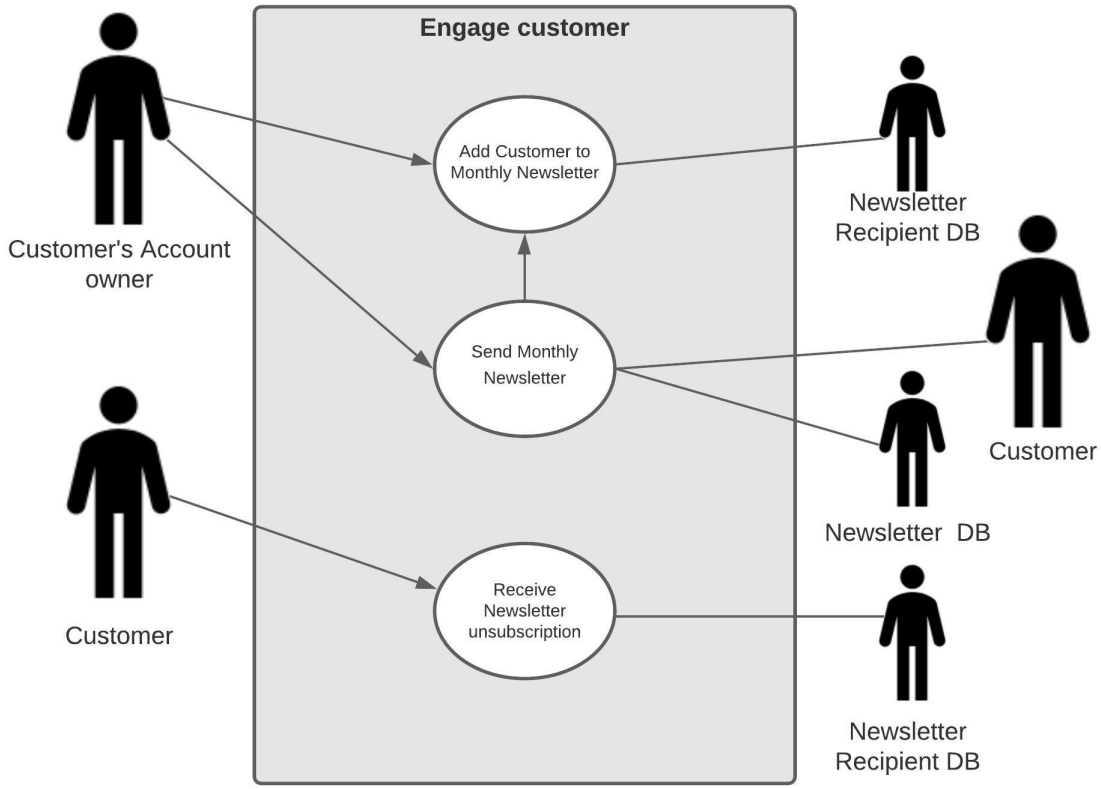
Subsystem 1: Develop Business



Subsystem 2: Process Sale



Subsystem 3: Engage Customer



Appendix 12 - PIECES Analysis & Underlying Problems

#	Initial Problems/Solutions	P	I	E	C	E	S	Underlying Problems
Develop Business								
1.01	The product offering can get complicated and confusing for certain leads	X	X					A
1.02	Some leads request information prior to the initial call, and never proceed with the sales call		X			X		A, E, F
1.03	Initial calls with the leads are un-tailored	X	X			X		A, E, F
1.04	Notes taken during the initial call are recorded only after the call based on memory.	X	X		X	X		B, D, E
1.05	Loss of leads in the pipeline due to heavy waiting time	X		X		X		A, C
1.06	It takes too much time to update and maintain the client data	X	X			X		A, E
1.07	The sales process is too varied, and the steps can have different meanings depending on the employee.		X		X	X		A, E, C
Process Sale								
2.01	The sales development employee can only negotiate with up to 3 leads at a time.	X			X	X		A, C
2.02	It takes too much time to update and maintain the client data.	X	X			X		A, E
2.03	The sales process is too varied, and the steps can have different meanings depending on the employee.		X		X	X		A, E, C
Engage Customer								
4.01	There is very little post-event processes in place to keep the customer engaged		X				X	G

Underlying Problem Codes	Code Descriptions
A	Process activities are too complex/inefficient
B	Data storage is not safe
C	Data is not updated consistently
D	Data collection is partial/not complete
E	Lack of lead information prior to meeting
F	There is little care towards engaging customers after an event happens

Appendix 13: PIECES Table 2 - Recommendations

Subsystem 1: Develop Business

Underlying problem	Impact on the proposed system DFD	No impact on the DFD (requires only IT solution)
A: process activities are too complex/inefficient	Creation of pre-meeting questionnaire dispatch, receival and treatment processes (P1.3:P1.6, D1, D12) Standardization of product documentation dispatch (P1.7, D13) Replacement of scheduling methods to a booking link (P1.10, D3)	
B: data storage is not safe		Update of CRM data fields: Quick fill (D1)
C: Data is not updated		Automation of CRM task assignment
D: Data collection is partial/not complete		Update of CRM data fields: Exhaustive data fields (D1)
E: Lack of lead information prior to meeting	Creation of pre-meeting questionnaire dispatch, receival and treatment processes (P1.3:P1.6, D1)	

Subsystem 2: Process Sale

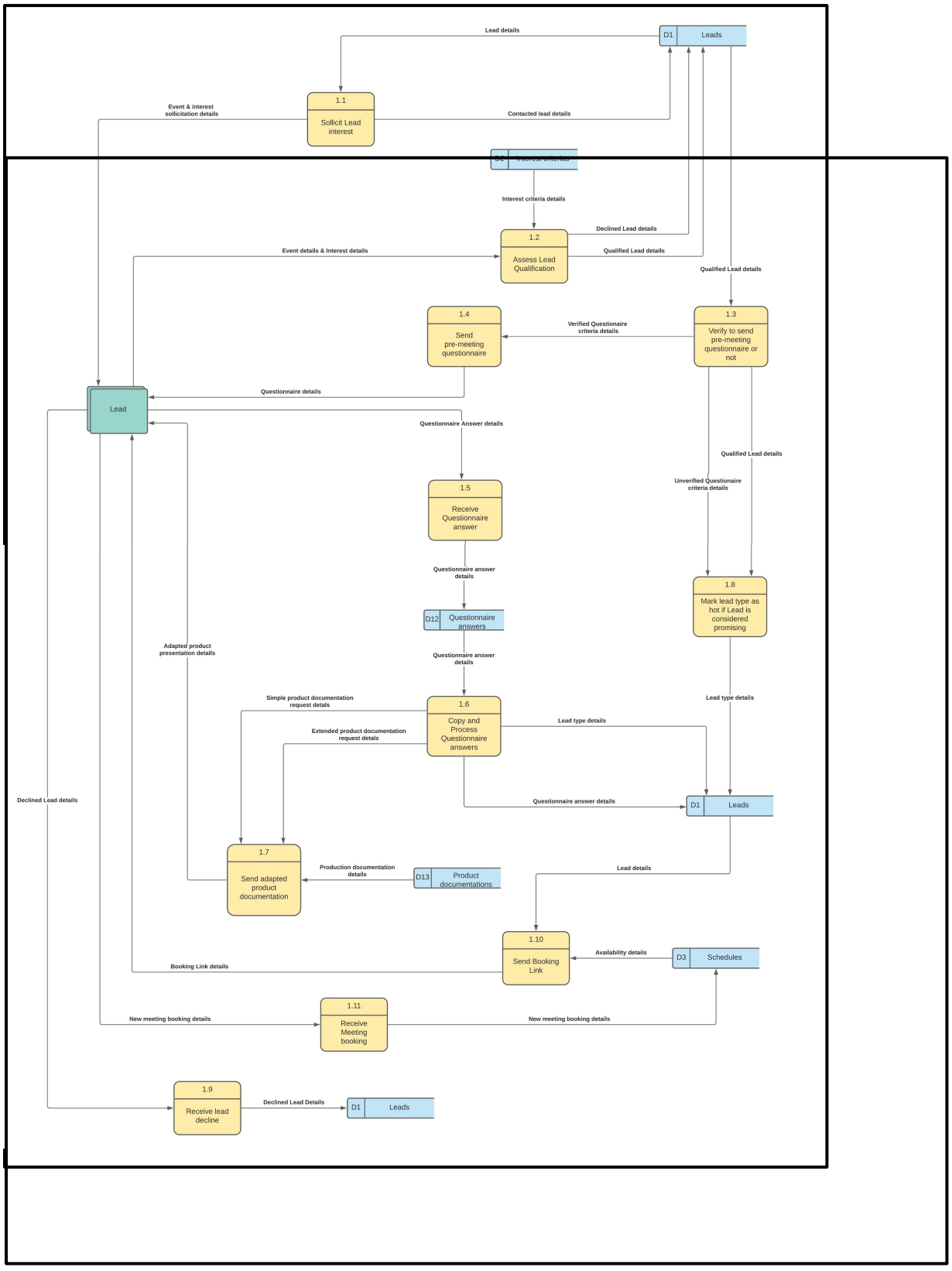
Underlying problem descriptions:	Impact on the proposed system DFD	No impact on the DFD (requires only IT solution)
A: process activities are too complex/inefficient		Simplication and standardization of CRM steps (D4)
D: Data collection is partial/not complete		Update of CRM data fields: Exhaustive data fields (D4)

Subsystem 3: Engage Customer

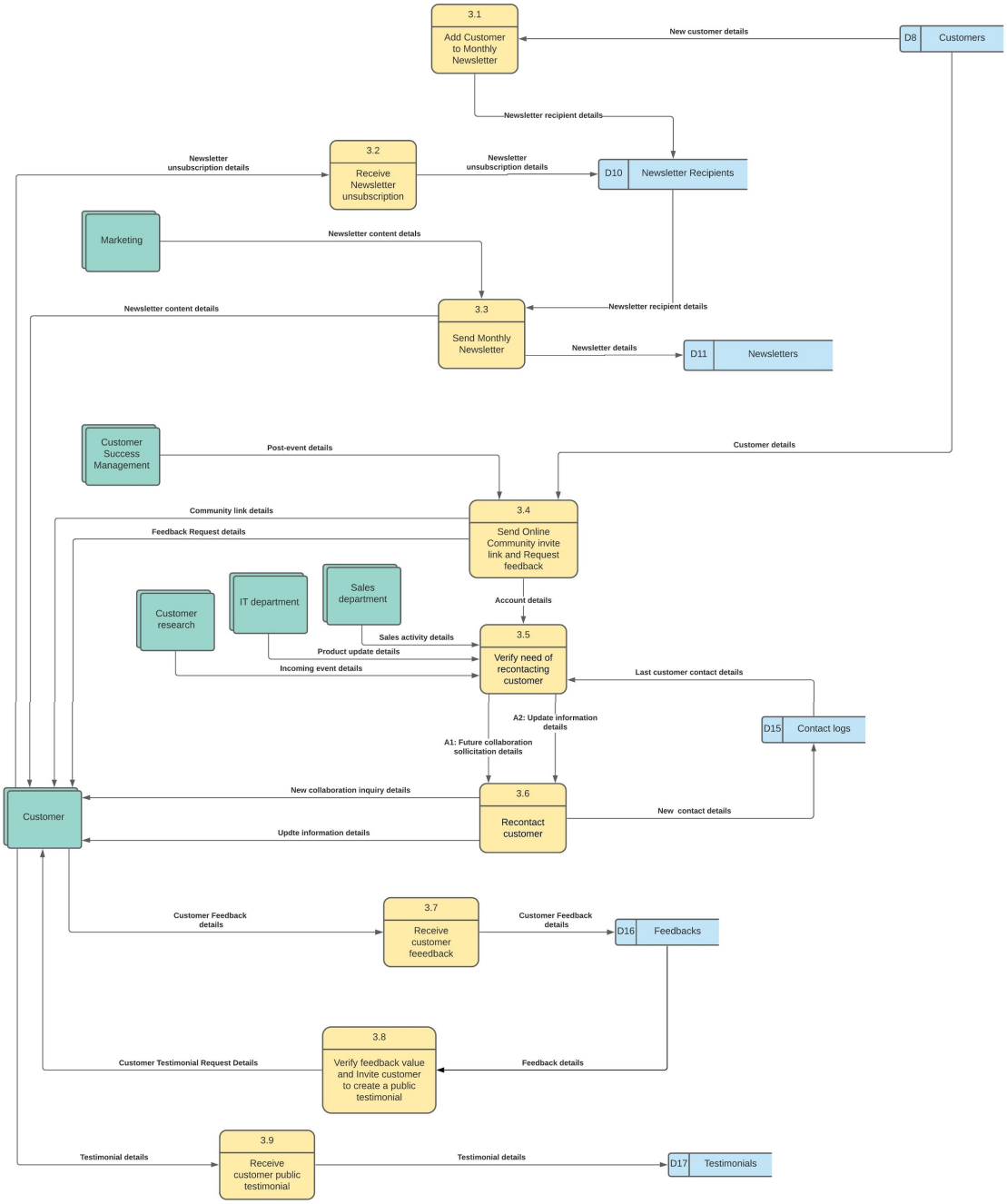
Underlying problem descriptions:	Impact on the proposed system DFD	No impact on the DFD (requires only IT solution)
F: There is little care towards engaging customers after an event happens	Addition of feedback and testimonial request and storage processes (P3.8:P3.10, D16, D17) Standardization of the recontacting procedures (P3.6:P3.7, D15)	

Appendix 14 - Proposed DFDs

Subsystem 1: Develop Business

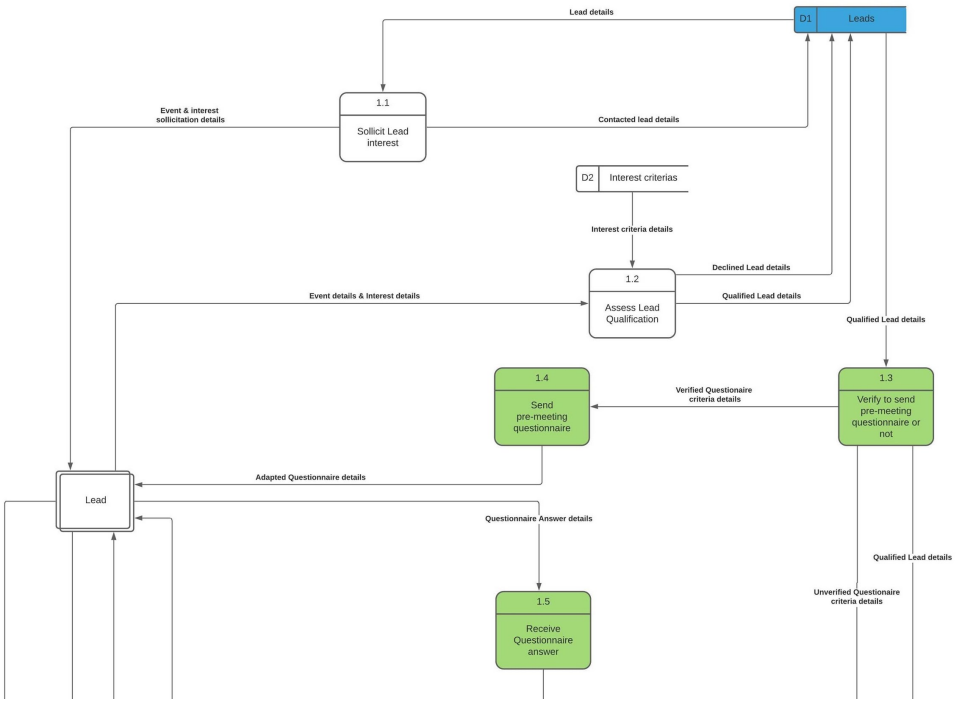


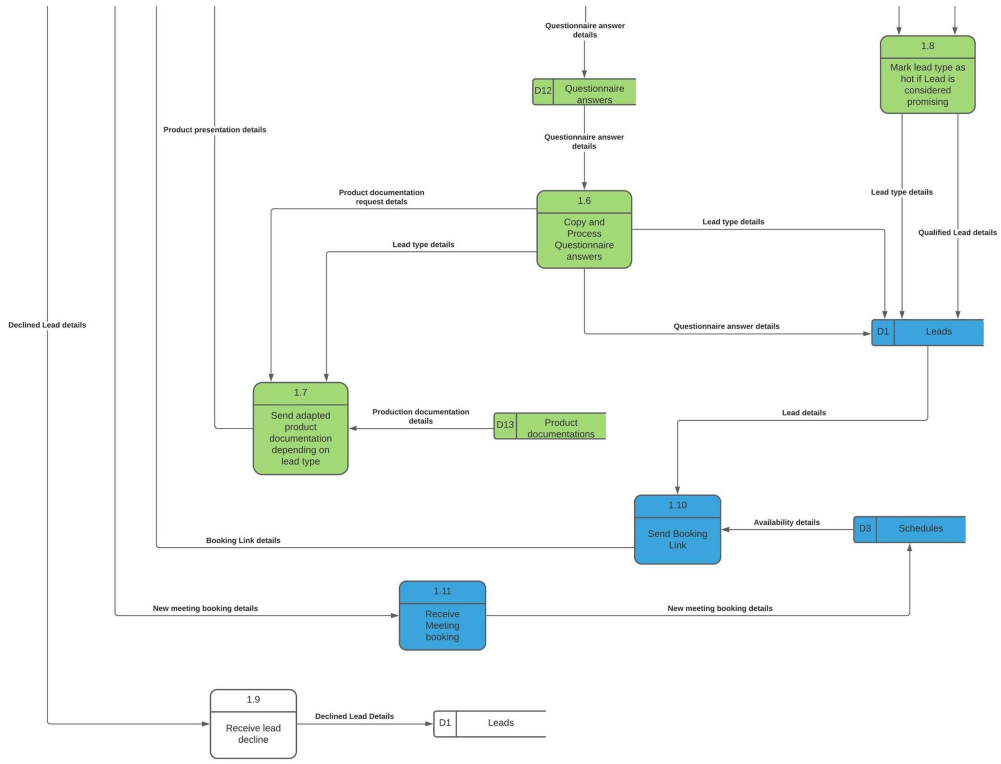
Subsystem 3: Engage Customer



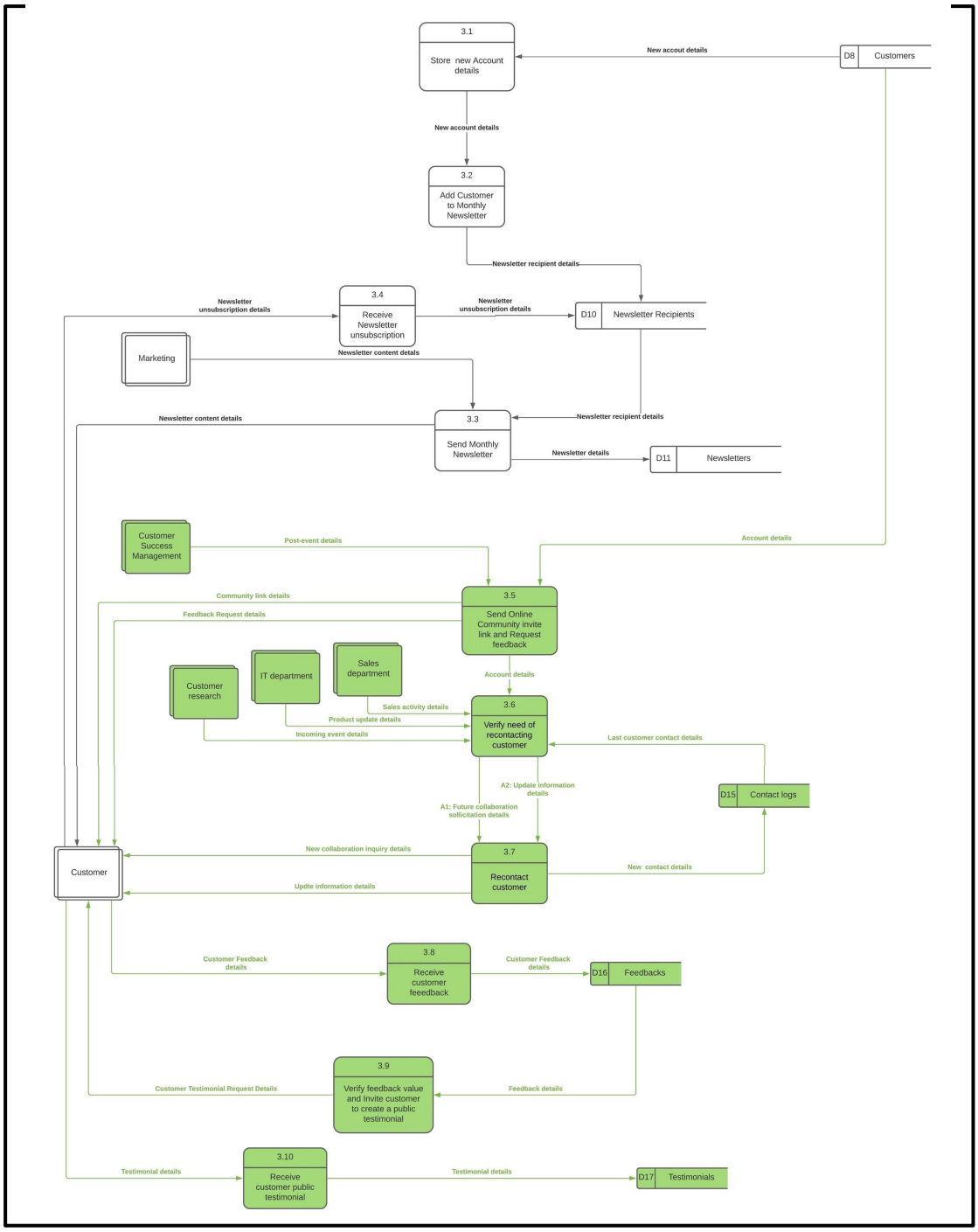
Appendix 15 - Color coded DFDs

Subsystem 1: Develop Business


Lead details
D1
Leads
1.1
Sollicit Lead interest
Event & interest sollicitation details
Contacted lead details
D2
Interest criterias
Interest criteria details
1.2
Assess Lead Qualification
Declined Lead details
Event details & Interest details
Qualified Lead details
Qualified Lead details
1.4
Send pre-meeting questionnaire
Verified Questionaire criteria details
1.3
Verify to send pre-meeting questionnaire or not
Lead
Adapted Questionnaire details
Questionnaire Answer details
Qualified Lead details
Unverified Questionaire criteria details
1.5
Receive Questionnaire answer


Questionnaire answer details
D12 Questionnaire answers
Questionnaire answer details
1.8
Mark lead type as hot if Lead is considered promising
Product presentation details
Product documentation request detals
1.6
Copy and Process Questionnaire answers
Lead type details
Lead type details
Lead type details
Qualified Lead details
Declined Lead details
Questionnaire answer details
D1 Leads
1.7
Send adapted product documentation depending on lead type
Production documentation details
D13 Product documentations
Lead details
1.10
Send Booking Link
Availability details
D3 Schedules
Booking Link details
1.11
Receive Meeting booking
New meeting booking details
New meeting booking details
1.9
Receive lead decline
Declined Lead Details
D1 Leads

Subsystem 3: Engage Customer



Appendix 16 - Logic Definition of Proposed DFD

Subsystem 1: Develop Business

Process 1.3 Conditions	R1	R2	R3	R4
C1: Contact person is familiar with Weezevent	N	Y	-	-
C2: Unusual Event characteristics	N	-	Y	-
C3: Lead contact is Tech Savvy	Y	-	-	N
Process 1.3 Actions				
A1: Mark questionnaire criteria as Verified	X			
A2: Mark questionnaire criteria as Unverified		X	X	X

Conditions for Process 1.6	R1	R2	R3	R4	R5	R6	R7	R8	R9	R10
C1: All questionnaire questions are answered	Y	Y	Y	Y	Y	Y	N	-	-	-
C2: Both contact person personal email and phone number are enterred	Y	Y	Y	Y	Y	N	Y	-	-	-
C3: Lead budget is defined	Y	Y	Y	Y	N	Y	Y	-	-	-
C4: Contact person is the decisioner	Y	Y	Y	N	Y	Y	Y	-	-	-
C5: Lead is interested in at least 2 products	Y	Y	N	Y	Y	Y	Y	-	-	-
C6: Event date and preferred implementation timeline are defined	Y	N	Y	Y	Y	Y	Y	-	-	-
C7:Lead needs more product information	-	-	-	-	-	-	-	N	Y	Y
C8: Lead type is hot	-	-	-	-	-	-	-	-	Y	N
Actions for Process 1.6										
A1: Mark Lead type as Hot	X	X	X	X	X	X	X			
A2: Send simple product documentation										X
A3: Send extended product deocumentation									X	
A4: Do not send product documentation								X		

Subsystem 3: Engage Customer

Process 3.5 Conditions	R1	R2	R3	R4	R5	R6	R7
C1: 6 months have passed since last contact	Y	-	-	Y	-	Y	-
C2: Receival of incoming event information	-	Y	-	-	Y	-	Y
C3: Product update in line with customer needs	-	-	Y	Y	Y	N	N
C4: Sales pipeline is overloaded	Y	Y	Y	N	N	N	N
Process 3.5 Actions							
A1: Recontact customer for future collaboration				X	X	X	X
A2: Recontact customer with update information			X	X	X		
A3: Do not recontact customer	X	X					