# LSE CA DA Employer Project Team Charter

## 1. Purpose

Summarise the following questions in a sentence to help your team understand everyone's motivations and develop a common sense of purpose.

| Team Member | What do you want to achieve in the Data Analytics Career Accelerator? | Why is this important to you? |
|---|---|---|
| Adrian | - Master core data analytics skills which will help me secure a data analytics role, preferably HR related | - I have long been interested in the potential of using evidence and data in an HR setting |
| Luis | - Gain practical skills in cleaning, analysing and visualising data to extract meaningful insights. Gain a mindset for data driven choices as every business decision should have a justification. | - This will help in my job where I already work with data, to improve the way I justify my work choices and make my decisions more valid. |
| Cellini | Gain knowledge and practical skills in utilizing data with a better approach to provide insights from a business perspective. | I would like to change a new career role for which something related to business analytics |
| Wenita | To gain hands-on experience applying problem-solving skills in a business context through data analytics | To develop an additional skill that broadens my capabilities and improves my CV. |
| Stephan | To obtain a strong understanding of the fundamentals of data analytics to answer and present different business questions with data. | I wish to develop and broaden my analytic skills for practical applications and understand the steps it takes to provide data driven answers, as that is a career pathway I am most interested in. |
| Angela | Master essential data analytics tools and techniques, while building a robust project portfolio to accelerate my career transition into data-driven roles. | Advance my career within the finance industry,become effective data professional capable of generating insights and driving business decision |

## 2. Approach

Project Management and Communication

What communication tools or channels will you use to collaborate and manage your project?

*- Google Docs for shared Word files*

*- GitHub for sharing Python code*

*- WhatsApp for ad hoc communication and meetings*

How will you manage team workload & assign tasks?

*We will manage the workload by breaking the project into workstreams based on the three main analytic focus points. Members share their strengths and interests towards their preferred analytical focus and team up in equal teams. Group meetings will be run weekly to derive coherent analysis plans between teams and assign tasks based on teams, agreed ideas, and individual strengths. During meetings, the group will agree on priorities within each focus, setting realistic goals, deadlines, and allocating ownership to tasks so accountability is clear. Within teams, as well as the group, meetings will have a set moment at the start of the meeting for anyone to raise concern of difficulty with tasks, requiring clarity and other forms of assistance. Outside-of-meeting discussions also will push for clarity for task delegation and analysis direction within the group. This ensures quality stays consistent with each member being in sync, in the aim of providing a coherent analysis.*

*Team member allocations:*

*1) Earnings dates and stock price movements; ADRIAN, STEPHAN*
*2) Financial metrics: key financials released on earnings dates;  WENITA*
*3) Macroeconomic factors: Evaluate how indicators like inflation or interest rates impact stock price behaviour; CELLINI, LUIS*
*4) Optional: Expanding with AI support LUIS (incorporate/integrate throughout*

*previous 3 areas)*

<u>Relationships and Team roles</u>

Who is the project lead, defined here as the person who will coordinate the project? Will this role rotate at certain intervals?

***Project lead role will rotate throughout project phases:***

- ***Phase 1: Coordination and planning - Stephan is project lead***
- ***Phase 2: Analysis coordination - Luis is project lead***
- ***Phase 3: Presentation coordination - Adrian is project lead***

What roles will other team members undertake? Think about your technical strengths and your human strengths, do you excel at ideation or are you amazing at proofreading?

***Based on team member strengths and interests, roles will be:***

***Luis for Technical Lead / Python support***

***Cellini for Quality Control***

***Adrian for Insight Synthesis, Storytelling***

***Wenita: Overall back-up and coordination***

***Adrian: I feel that I'm good at written communication, in particular structuring information clearly and expressing ideas in a way that's easy to understand. This may be helpful when it comes to preparing our presentation to VP Analytics.***

***Stephan: I am quite detail-orientated and am good at going in depth with my analysis, often trying to link maths to my approach or to give an induction or rationale behind observations. But I am confident in interpreting findings and using context to give strong conclusions as well.***

***Cellini: I am good at proofreading and detail-oriented, as I used to work in the a risk and control role in banking industry previously.  Thus, I would able to utilize this strength to assist the team.***

Empathy and Listening

How will you make sure all members of the team are heard?

*We will take notes for each meeting and make sure that anyone unable to attend can easily access them and contribute their input afterward. During our meetings, we will also make a conscious effort to check in with one another to ensure everyone feels included and engaged in the team's discussions and decisions.*

How will you reconcile different ideas, points of view, or disagreements?

*We will address any differences of opinion openly and in a timely manner, ensuring that concerns are discussed before they escalate. We will also avoid making disagreements personal and keep in mind that we are all working toward the same shared goal.*

Attitude and Availability

Choose three attitudes or values that define your team ethos.

*We are committed to upholding accountability by taking responsibility for our work and our contributions to the team. We will act with integrity and professionalism by following through on the commitments we make and maintaining high standards in everything we deliver. At the same time, we will foster a collaborative environment where we actively support one another, offer help when needed, and work collectively toward our shared goals.*

When are meetings held and what communication is expected outside of meetings?

*We plan to hold team meetings every weekend at 10 a.m. UK time, either on Saturday or Sunday depending on availability. Between meetings, we will use our WhatsApp chat for ad hoc communication to keep discussions moving. We will also share ideas and collaborate by uploading documents to platforms such as GitHub or Google Docs, where everyone can add comments and suggestions directly to the files.*

<u>Contribution and Escalation</u>

What defines satisfactory contribution in your team?
***We aim to contribute at a high and consistent standard by delivering work that matches the quality and effort demonstrated in previous assignments, supporting one another when needed, and completing all assigned tasks to meet the team's agreed expectations.***

If contribution is lacking how will you address and escalate this?
***As noted in the Empathy and Listening section, we will communicate openly and in a timely manner when issues arise. If the team is unable to resolve a concern internally, we would escalate the matter to one of the Success Managers as the appropriate point of contact.***

<u>Help and Feedback</u>

How will you support your team mates?

***We will maintain open, two-way communication by giving and receiving feedback constructively, staying friendly and accessible to teammates, and responding to their questions promptly. We will also make a point of understanding different perspectives, resolving conflicting feedback through group discussion, and seeking timely support from our Success Manager(s) whenever we encounter challenges we cannot resolve on our own.***

How and when will you give feedback on tasks completed or work in progress?

***We have agreed to form pairs to collaborate on the main focus areas (see Project Management and Communication). Within each pair, we would coordinate with our partner on the specific tasks to be completed and the corresponding deadlines, creating natural points for exchanging feedback. We can share feedback through platforms such as GitHub or Google Docs, and we will also continue to review and discuss feedback as a full group during our regular weekly meetings.***

**3. Team Name**

Choose a team name that represents the unique aspects of your team

*We chose a name that reflects how our group are based in multiple countries: "East-West Analytics".*

## 4. Signed Agreement

I agree to abide by the agreements made as a team for the duration of the Employer Project.

I agree to contribute equitably to this project and maintain regular communication with my team.

I agree that failure to keep these agreements may result in being removed from the team.

Team Member Name: *Adrian Yates*

Signature:

Team Member Name: *Stephan Novobritsky*

Signature:

Team Member Name: *Luis Cook*

Signature:

Team Member Name: *Sze Cheuk Cellini Cheng*

Signature:

Team Member Name: *YIP Yee-yan, Wenita*

Signature: