

Attendees

Team: Rebecca, Zakarya, Nicholas, Terry, Tiana

Client: Fanyu

Questions

Intro

What is the idea behind the CRM?

- Good to speak with customers and keep relationship with them
- Would like to have some personal functions (as the client)

What kind of customers?

- Business managers that give work to do
- Supervisor from company
- Middle-men to give jobs
- 1. Company leaders
- 2. Outsourcing customers
- 3. Colleagues

What CRMs could we look at as comparison?

- List of CRMs

What is the overall goal you want it to achieve?

- Telephone book
- Search function
- Filter
- Lots of customers and all their information
- When client gets customer:
 - Personal info
 - Company info
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Who is the target customer?

For client to interact with these people:

- Business managers that give work to do
- Supervisor from company
- Middle-men to give jobs
- 4. Company leaders
- 5. Outsourcing customers
- 6. Colleagues

- 2 user examples? (for user stories)

- Age group
- Gender
- Location

Do we need two users profiles (personas)?

- Client

Outline of what client would like:

Profile page

Name

Gender

Photo(optional)

Numbers

Email

Address

Company

Position

Available meeting method

Progress

- Filter

Priority

- Text

Created time

- Time the client was added in CRM

Last contact time

- Last time there was a stage change in progress

Search: name/phone number

- Want to be able to search by name or phone number

Filter: Progress(new, invited, met, negotiation, conclude), Priority(High, Med, Low)

Ordering: newest created, latest contacted, longest time without progress

- Not that important

Notification:

Meeting days.

Customer hasn't contact over half months.

- Notifications on the web app
- Bell that has number based on number of notifications

Motivational modelling

Are you familiar with motivational modelling? If so, develop an agreed model with the client using this:

Who	Do	Be	Feel
User (client, software dev)	Use the CRM	Scalable, robust, concurrent	Good ! Fresh ! Professional !

Specifics

What do you want it to do?

Must have features	Should have features	Could have features (if time)	Won't have
(Client information) Name, gender, phone number email	Filter (priority)	Ordering	Message system
(Company info) Company, position, available	Notification (customer hasn't contacted)	Notifications (meeting days)	Dashboard
Search function		Profile photos	
Good UI		Dark mode	
List of clients (click to get details) - where you can filter			
Contacts UI vibe			
Login page (just password)			
Secure (don't save raw data into			

database - encode password)			
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What do you want it to look like?

Style (eg clean, minimal, colourful, dynamic)	Must have elements (eg specific colours or fonts)
<ul style="list-style-type: none"> - Not fussed - Bootstrap - No colour - Darker colours - Dark mode? - Phone book vibes - Tap icon in corner 	<ul style="list-style-type: none"> - Good UI

Practical requirements

What should its security be like?

- Hash coding for password
- Don't save raw data into database

What platforms do you want it to run on (desktop, mobile, etc)?

- Web app

Admin

Where do we want to store our requirements?

- Options?
- Need to create essentially a Product Requirements Document - this can be worked on following our initial meeting and elicitation ideas and requirements