First client meeting with Catherine Barr

Date: Tuesday, January 28,2025

Venue: Online (Team)

Meeting Attendees:

* Catherine Barr
* Damario Abdalla
* Jiahe Li
* Ziyuan Wang
* Daniel McGhee
* Mrinali Dole
* Haiyang Yuan

Discussion Points

1. Problem Statement & Project Importance

* Catherine introduced the project, which focuses on customer order efficiency.
* The company aims to reduce dock breakdown time, which currently ranges from 4 to 8 hours.
* The study will identify parameters impacting dock time and provide insights for sales teams.

Action Item: Catherine to provide a detailed problem statement and key objectives.

2. Data Availability & Next Steps

* The dataset is not yet available but is being pulled by internal teams.
* A data dictionary will be provided along with the dataset.
* A follow-up meeting will be scheduled to review the dataset.

Action Item:

* + Catherine to confirm dataset availability by mid-next week and share it via email.
  + Team to schedule a data review meeting once the dataset is available.

3. Project Scope & Flexibility

* The project will be used as an insight tool to help salespeople analyze customer ordering patterns.
* Sales teams will use it to identify inefficiencies, such as customers placing too many purchase orders (POs) per load.
* The team is not limited to dashboards; other tools or applications can be explored.

Action Item:

* + Team to explore customer segmentation as a possible approach.
  + Initial brainstorming session to define tool requirements.

4. Data Structure & Analysis Approach

* The dataset will cover one year of customer order data at an individual customer location level.
* The dataset will include:
  + Customer Number (Ship-to Location)
  + Loads received per customer
  + Breakdown of each load into multiple POs
* Insights will be used to improve customer order efficiency and dock operations.

Action Item: Team to prepare an initial framework for analyzing order efficiency.