Second client meeting with Catherine Barr

Date: Thursday, February, 20, 2025

Venue: Online (Team)

Meeting Attendees:

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

**Discussion Points**

**1. Data visualization tool and data file introduce:**

* Catherine introduced a dynamic sales tool designed to assist outside sales representatives
* The tool will provide a 360-degree view of the customer, including customer name, customer size (defined through different "Tier" levels, such as large corporations like Walmart categorized as "Corporate," while other customers are classified into Tier 1, 2, and 3)
* The data will also include metrics such as average dock time, pounds per period, case counts, line counts, and pallet counts
* Key data points include the unique identifier "load Number" and "Customer Number Ship To". A load number can include many customers’ number
* The tool will enable performance comparisons between the customer and its peers (similar-tier customers) and present the customer's period-over-period performance through graphical representations

**2. Next Steps of Catherine:**

* Catherine plans to clean up the data this afternoon, fill in any missing data points, and create a data dictionary and a visual mock-up
* A data dictionary will be provided along with the dataset
* Talk to the sales team to ensure the "item spread" column is accurate and ready to use

**3. What our team need to do:**

* Review the data and data dictionary provided by Catherine to ensure all necessary data points are complete
* Test the tool by entering the customer number to verify whether it can successfully extract customer information, customer tier, and related data
* Develop and design a data visualization tool to display the customer's period-over-period performance and compare it with peers (similar-tier customers)
* Prepare to present the phase one product in upcoming meetings and maintain communication with Catherine to ensure the product meets her expectations
* The current visual mock-up is just an initial concept, and the team is encouraged to provide more creative designs and solutions