**Meeting Minutes**

**Meeting: Kickoff for EvolutionCo Digital Project Management & Client CRM System**

* **Date & Time:** October 20, 2025, 10:00 AM - 10:45 AM
* **Attendees:** CEO, Alex (Project Manager), Jordan (Tech Lead), Satyam Pandey (Business Analyst)
* **Agenda:** Discuss project objectives, scope, pain points, and next steps.
* **Key Points Discussed:**

1. **Current Issues:** Manual processes (spreadsheets, emails) cause delays in client onboarding, project tracking, and invoicing. No visibility into project health or KPIs.
2. **Goals:** Build a standalone MVP with client onboarding, proposal tracking, task allocation, invoicing, and KPI dashboard. Success metrics: 50% faster invoicing, 80% task visibility.
3. **Scope:** Focus on MVP; exclude third-party integrations, HR, Marketing, and client feedback (Phase 2).
4. **Stakeholders:** CEO (oversight), Alex (PM), Jordan (Tech), Sales, PMs, Finance, UI/UX. RBAC for security.
5. **Timeline & Budget:** 12 weeks (MVP by Jan 12, 2026), ~$50K budget.
6. **Tech Notes:** React/Node.js, data migration from Google Sheets, user adoption risk.

 **Decisions Made:**

* Proceed with standalone MVP, no integrations for Phase 1.
* BA to draft Project Charter, Meeting Minutes, Stakeholder Register by EOD Oct 21, 2025.
* Schedule requirement-gathering workshops within a week.

 **Action Items:**

* Satyam (BA): Draft and submit Project Charter, Meeting Minutes, Stakeholder Register by EOD Oct 21, 2025.
* Alex (PM): Coordinate workshop attendees (Sales, PMs, Finance).
* Jordan (Tech Lead): Confirm tech stack (React/Node.js) and plan data migration.