Minutes of Meeting

Project Name: [Bloom Consulting full stack development]
Client Name: [Bloom Consulting]
Date: [02/11/2025]
Time: [2:30 – 3:30]
Location: [Zoom]
Attendees:

- [April Needham]
- [Zvikomborero Masike]
- [Anthony Devito]
- [Tasha Meadows]

1. Agenda

- Go over presentation that showcases our ideas from our research
  - Workflow
  - CRM
  - Emails
  - Calendar
  - AI agent
- Talk about what we want to integrate this month
- Deadlines

2. Meeting Summary

- **Introduction:**
  - Going over our research in a presentation
- **Client's Requirements:**
  - Include booking selection and email sending on contact us page
    - Set up auto response for email for contact us page
      - If interested in meet, then book with us
      - Tidycal – complementary meeting
  - **Key Discussion Points:**
    - Inbox pilot as the email automation tool
    - Calendar integration into Wix
    - Message automation in Wix
    - Wix workflow
    - Presentation automation
      - Gamma

- - - Beautiful.AI
    - Slides AI
- **Decisions Made:**
    - We will attempt to implement Wix automations for emails since contacts are synced
    - Look into tidycal vs wix bookings
    - Wix workflow is a good idea as it keeps everything centralized
    - Way to see if we can check where a lead is in the process using automations
    - Use Wix analytics not Wix analytics
- **Action Items:**
- [Action Item 1: Wix calendar vs tidycal]
- [Action Item 2: embed tidycal into wix]
- [Action Item 3: Auto response after contact form]
- [Action Item 4: Track leads in sale cycle through automation]
- [Action Item 5: SEO]

3. Project Milestones Discussed

- [By next meeting: Follow up and fulfill action items]

4. Next Steps

- [Test out researched features]

5. Next Meeting

- **Proposed Date:** [02/25/2025]
- **Proposed Time:** [2:30-3:30]
- **Location:** [Zoom]

Meeting Notes Prepared By: [Tasha Meadows]
Date: [02/11/2025]