Minutes of Meeting

Project Name: [Bloom Consulting full stack development]
Client Name: [Bloom Consulting]
Date: [01/28/2025]
Time: [2:30 – 3:00]
Location: [Zoom]
Attendees:

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

1. Agenda

- Discuss future meetings and requirements
- Talk about what can be automated

2. Meeting Summary

- **Introduction:**
  o We mentioned a CRM that we could integrate into Wix
- **Client's Requirements:**
    o
- **Key Discussion Points:**
- o Email marketing
  - She wants to hire people for marketing for legal purposes
  - On boarding sequence (WE collective) automated
    - When people join the mailing list
  - AI agent
    o For email drafts
    o Calendar editing / management / organization
    o Lecture / teaching slide decks
    o Questionnaire for new clients to learn about their business
    o Event planning checklist
  - AI agent not locally stored
- **Decisions Made:**
    o April has an appointment with a marketing team, and they will discuss best practices, and she will get back to us.
- **Action Items:**

o   [Action Item 1: Look into ways AI can assist her with her work]

3. Project Milestones Discussed

- [Work with our client to figure out what we can do to make her tasks easier and less time consuming]

4. Next Steps

- [Research and come up with ideas that would lessen the workload of our client]

5. Next Meeting

- **Proposed Date:** [02/11/2025]
- **Proposed Time:** [2:30-3:30]
- **Location:** [Zoom]

Meeting Notes Prepared By: [Tasha Meadows]
Date: [01/28/2025]