



Minute Kick Off Meeting

DATE:

16th February 2024

LOCATION:

Faculdade de Engenharia da
Universidade do Porto, Sala B344

Participants:

Client (Galp Energia):

- José Nascimento da Silva

Development team:

- Abílio Epalanga
- Aníbal Ferreira
- Beatriz Regis
- Gonçalo Boa-Nova
- Henrique Lopes
- Henrique Ferreira
- Jamim Oliveira
- João Matos
- José Miguel Ribeiro
- Karina Dias
- Maria Inês Rebelo
- Rodrigo Ferreira

- Tomás Silva

TIME STARTED:	15h50
TIME ADJOURNED:	16h40
MEETING OBJECTIVE:	The meeting aimed to discuss the requirements and expectations for developing an internal digital platform exclusively for Galp employees, focusing on CRM functionalities and project management.

The following are the agenda/s in the said meeting:

1. Team introduction
2. Client introduction
3. Project introduction
4. Development questions
5. Milestone definition

Topics discussed:

Project Overview:

We confirm that Galp currently does not use any CRM platform and that the new solution will be aimed at approximately 700 to 1000 office workers. It was established that the platform will be an internally accessible website, without access by stakeholders or clients.

Interface Testing:

A user interface test can be conducted with a sample group of 100 people from the company to ensure usability and identify possible improvements before the full launch.

Database:

It was agreed that the development team can simulate data for platform development and testing, as there is currently no existing database.

Meetings with Partners and Clients:

The need to record interactions in meetings with partners and clients, including participants and topics discussed, was highlighted.

Functionalities and Features:

During the meeting, the platform's main functionalities were defined, including meeting scheduling, individual calendar management, communication logging (emails and phone calls), and project timelines. The platform will be modeled with inspiration from tools like Teams, OneNote, and Gmail, with a Teams-style dashboard for easy access to the latest information and project histories.

Search Bar and Filters:

A search bar with filters will be implemented to facilitate finding specific information, such as topics, employees, companies, etc. in order to allow tracking of specific topics, facilitating tracking and filtering of related information.

Email Overload Issue:

It was identified an interaction problem currently faced by the team, where email communication is not as fast as desired, since the problem of forwarding emails to inform about the status of projects will be resolved with the platform's search functionality, allowing quick and centralized access to relevant information.

User Hierarchy and Permissions:

We confirmed that the platform will have at least two user hierarchies, with different levels of permissions for access and data editing.

Communication Client-Team

It was suggested by the client the creation of a WhatsApp group in order to make communication less formal and faster.

Main Problems Identified

1. **Lack of CRM Platform:** Galp currently does not use any CRM platform, leading to inefficiencies in managing customer relationships and interactions.

2. **Slow Email Communication:** There is an identified issue with email communication within the team, where communication via email is not as fast as desired, hindering productivity and collaboration.
 3. **Difficulty in Recording Interactions:** There is a need to record interactions in meetings with partners and clients, but there isn't a systematic way to do so, leading to potential loss of valuable information.
 4. **Email Overload:** The practice of forwarding emails to inform about the status of projects has led to email overload and inefficiencies in information retrieval.
 5. **Need for Centralized Information:** There is a need for a centralized platform where employees can access and manage project-related information, communications, and schedules efficiently.
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Next Steps

Client

- The client agreed to send screenshots of other internal tools and guides for the design team (such as Visual Identity Manual)

Development Team

- To reach out to the client when the plan for the project is finalized, with all the information necessary.