

## **Transcript of Meeting between Regget Smith (Sunny Side Up) and Moises (ANALITICA)**

**Meeting attended by:** Moises Cohen, Anshu Kumar, Ashu Prakash, Regget Smith

**Date:** 30<sup>th</sup> May 2024

Moises: Good afternoon, Regget. It's great to meet with you today. How are you doing? How can we assist you further with the dashboard view you mentioned last time?

Regget: Good afternoon, Moises. Thanks for taking the time to meet. I've been discussing with Sarah, and I wanted to add a new view to the dashboard you're creating for us. We need a way to track our store managers, Regional Operations Directors (RODs), and District Operators (DOs). This will greatly assist our finance team in rewarding these individuals based on their performance.

Moises: That sounds like a valuable addition. Could you provide some details on what metrics and information you would like to see in this new view?

Regget: Certainly. The main focus should be on identifying the top-performing managers based on their sales. We should include details of the stores they manage, such as location, sales figures, and any other relevant performance indicators. Beyond that, I'm open to your suggestions. Feel free to be creative with the presentation.

Moises: Understood. We can create a view that highlights key performance metrics for each manager, ROD, and DO. This might include total sales, sales growth, customer satisfaction scores, and perhaps even staff retention rates. We can also add filters and sorting options to make it easier to navigate and compare performance across different regions and districts.

Regget: That sounds excellent. The ability to filter and sort data will be very useful. Can we also include visualizations like charts or graphs to make the data more accessible and easier to interpret?

Moises: Absolutely. We can incorporate various visual elements such as bar charts, line graphs, and heat maps. These visualizations will help quickly identify trends and top performers. We can also add a monthly leaderboard feature to showcase the top managers and their respective metrics.

Regget: A leaderboard feature would be fantastic. It'll provide clear visibility into who is excelling and could serve as motivation for others. What kind of data updates can we expect?

Moises: We can set up the dashboard to update in real-time or at regular intervals, depending on your data infrastructure. Real-time updates would ensure that you're always looking at the most current information, which is crucial for performance-based rewards.

Regget: Real-time updates would be ideal, but right now we have a static data from last year. Can we also include an option to export reports from this view?

Moises: Certainly. We can add an export feature that allows you to download detailed reports in various formats, such as Excel. This will make it easier for your finance team to analyze and present the data as needed.

Regget: Perfect. This new view is going to be incredibly useful for our operations and finance teams. How soon can we expect this to be implemented?

Moises: We'll begin working on the design and integration immediately. Given the additional requirements, it should not take us a few hours to develop, test, and deploy this new view. We'll keep you updated throughout the process.

Regget: That timeline works for us. I appreciate your flexibility and creativity with this. Looking forward to seeing the final product.

Moises: Thank you, Regget. We're excited to enhance the dashboard for Sunny Side Up. We'll be in touch soon with the final dashboard.

Regget: Great, thank you, Moises. Talk to you soon.

Moises: Awesome, Regget.