
Subject:

Meeting minutes: SectorMetric discussions

Hi,

Thank you for your time yesterday. The InsideSherpa - Deloitte team is looking forward to helping advise and guide SectorMetric in their market scan, evaluation and selection for a new financial accounting management solution.

Here's a summary of what we discussed. We will draft an official project plan based on the information that we have captured below.

Project phases

- The project will be divided into the following two key phases.
 - Technology Evaluation (Phase 1)
 - Requirements Gathering and Focus Area Assessment
 - Help facilitate workshops with key stakeholders within SectorMetric's Finance team to identify requirements
 - Guide SectorMetric through the process of requirement prioritisation and use case development
 - Technology Analysis and Selection (Phase 2)
 - Analyse the market for potential technology solutions
 - Provide guidance and advice on how the technology's solution will address the key functional requirements, exceptions or focus areas

Proposed financial accounting solution

- The proposed financial accounting solution must meet the following criteria. We will elaborate on these high level requirements in the project plan pack.
 - Must be able to anticipate a potential growth in the end user base over the coming years
 - Must be able to meet business requirements for reconciliations, consolidation of financial information from multiple sources, reporting to regulators amongst others

Fees

- Total discussed budget for this project will be \$100,000 over the duration of 6 weeks. We will propose a resource breakdown which will include the following key personnel
 - Engagement partner
 - Director
 - 2 x Senior Consultants

Risks, Issues and Dependencies

- Any relevant risks, issues and dependencies will be analysed and finalised in the project plan pack

Kind regards,
InsideSherpa - Deloitte team