Post-Interview Template: (Feel free to modify)

Today’s Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Interview: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Interviewees: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Purpose of Interview: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Summary of Interview Findings:

The main focus for now is tracking production, quality and customer returns. We also want to track inventory (raw materials and finished goods) too, so from that perspective there may be some interaction with accounting. We need a way to add to raw materials inventory from incoming goods/materials, and a way to add finished good inventory from production, and reduce raw material inventory from production.

Everything is under one building and not sub-contracted out.

We would like to track lure production quality, and lure incoming materials quality, but these are Wants, not Needs, for now. The consideration for now is that we know we will want to do this in the future, so planning for that with attributes/fields in the product table information would be a great start.

The Credit Return form is currently manual. The minimum information we need is the customer name and address. Also either their phone number or email address so we can communicate with them. The date they purchased is necessary, along with the date they submit the form. The reason they are returning is also required. Nice-to-haves are the model, the return authorization code, and their signature.

We have a contract with UPS and all shipments today are Ground only. We have heard from our customers that they would appreciate being able to upgrade to 1 or 2 day shipping. We count on having the orders ready to ship within 2 days, so it would be nice if we could get the product to the customer faster if they wanted to pay for it. This is a Want, not a Need.

We do offer a lifetime warranty on all the rods if it is determined it is a manufacturing defect.

We are really looking for better reporting of production, quality and inventory control. We need to know how many good rods we have in inventory, and the quantities of raw materials we have in inventory to support building more rods. We then could know when we need to purchase more raw materials.

Open Items/Next steps:

1. Construction of Workflow diagrams.
2. Listing all active business processes.
3. List out possible changes to the business to bring to the next interview meeting.
4. Come up with any follow up questions (for more clarification or just thought of later)
5. Think of possible UIs needed