Client Interview Transcript for Software Development Project

Participants

- **Business Analyst (BA):** Alex
- **Client (CL):** Sarah, Manager at a Small Logistics Company

Transcript

BA: Thank you for meeting with me, Sarah. I know your time is valuable, so I want to make the most of this discussion. Let's start with a broad overview. What is the main problem you're looking to solve with this software?
CL: Thanks, Alex. Well, as you know, we're a logistics company, and our biggest challenge right now is tracking shipments and managing deliveries. Everything we do is very manual—spreadsheets, phone calls, and physical notes. It's not efficient, and mistakes happen. Sometimes packages are delayed, and customers call us frustrated because we can't give them clear updates.
BA: That sounds stressful. So, one of the key goals is to have better visibility into the status of shipments to reduce manual tracking and improve customer communication. Is that correct?
CL: Exactly. If we can see where every package is at all times, it would be a game-changer for us.
BA: I see. Can you give me a specific example of how you currently manage deliveries?
CL: Sure. Let's say a driver picks up 20 packages for delivery. The dispatcher gives them a printed list with addresses. The driver follows that list, but if there's traffic or a customer isn't home, the driver has to call the office to figure out what to do next. It's chaotic, and we end up wasting time.
BA: So, you're saying that the current process doesn't allow for flexibility or quick updates when something unexpected happens.
CL: Yes, and it's frustrating for the drivers, too. They need a better way to adjust their routes on the fly.
BA: Got it. A route optimization feature that can adjust dynamically would help. Would you prefer this to be a mobile app for drivers?
CL: Yes, a mobile app would be ideal. Drivers could see their updated routes in real-time without needing to call the office.
BA: That makes sense. Let's talk about your customers. What kind of experience do you want them to have with this system?

CL: The main thing is that they should be able to track their shipments online. Right now, if they want an update, they have to call us, and we don't always have the information ready.
BA: So, you'd like a customer portal where they can check the status of their shipments without needing to contact your office.
CL: Exactly. And it would be great if they could get automatic updates—like emails or texts—when their package is out for delivery or if there's a delay.
BA: Notifications are a great idea. Would you also want customers to be able to do things like reschedule deliveries or provide special instructions?
CL: Yes, that would save us so much back-and-forth communication. For example, if someone isn't going to be home, they could tell us to leave the package at the back door or deliver it the next day.
BA: That's a helpful feature. Let's summarize the customer-facing features so far:

- An online portal for shipment tracking.
- Automated notifications about delivery status.
- The ability to reschedule deliveries or add instructions.

CL: That sounds perfect.
BA: Let's shift gears and talk about your team. Who will use this system internally, and how do you envision them using it?
CL: The dispatch team will be the primary users. They'll need to assign deliveries to drivers and monitor their progress throughout the day.
BA: How do they currently handle those tasks?
CL: Right now, they use spreadsheets to create delivery lists and print them for the drivers. If there's an issue, the drivers call the dispatcher, and they update the spreadsheet manually. It's clunky and prone to errors.
BA: So, you need a more streamlined way for dispatchers to assign and track deliveries in real-time.
CL: Yes, and they should also be able to see where the drivers are on a map. That would make it much easier to manage everything.
BA: Understood. Do you also need reporting features? For example, to track overall performance or identify bottlenecks?
CL: Absolutely. I'd like to see reports on things like delivery times, delays, and fuel usage. That data would help us improve efficiency.
BA: That's very useful. Let's talk about drivers. What specific tools or features would make their jobs easier?
CL: In addition to route optimization, I think a simple interface for them to mark deliveries as completed or report issues would help.
BA: So, something like a delivery checklist or status update feature in the mobile app?
CL: Exactly.
BA: Got it. Moving on to integrations—do you have any existing systems this software should connect with?
CL: We use QuickBooks for accounting, so if the system could automatically generate invoices or sync with our records, that would be great.
BA: Noted. Finally, are there any regulatory requirements we need to keep in mind?
CL: Yes, we have to keep delivery logs for at least six months to comply with local transportation regulations.

BA: Thanks for letting me know. To summarize:

- For internal users, you need real-time delivery tracking, route optimization, and reporting.
- For customers, you need a portal with tracking, notifications, and rescheduling options.
- The system should integrate with QuickBooks and meet regulatory requirements for record-keeping.

CL: That sounds like everything we need.
BA: Excellent. One last question: Do you have any timeline or budget constraints that we should be aware of?
CL: We'd like to have something operational within six months. As for the budget, we're open to discussing options once we see the initial proposal.
BA: Perfect. I'll draft an initial set of requirements and get back to you with some proposals. Thanks again for your time, Sarah.
CL: Thank you, Alex. I'm excited to see what you come up with!

Tasks

Step 1: Identify User Stories

Using the transcript, extract at least five user stories. Ensure they are written in the standard format: *As a [user role], I want to [action] so that [goal].*

Example: *As a dispatcher, I want to assign deliveries to drivers and track their progress in real-time so that I can ensure timely deliveries.*

Step 2: Break Down User Stories into Use Cases

For each user story, create a use case using the following format:

- **Title:** Name of the use case.
- **Actors:** Who are the users or systems involved?
- **Precondition:** What must be true before this use case starts?
- **Steps:** Describe the main actions or events.
- **Postcondition:** What is the outcome of the use case?

Example Use Case: Title: Customer Shipment Tracking **Actors:** Customer **Precondition:** Customer logs into the portal. **Steps:**

1. Customer enters tracking ID.
2. System fetches and displays real-time shipment details.

Postcondition: Shipment status is displayed.

Step 3: Define Technical Tasks

Break down each use case into technical tasks. These tasks should be actionable and clear for developers. **Example Tasks:**

- Develop customer login module.
- Build backend for real-time shipment tracking.
- Create user interface for tracking status.

Step 4: Create a Product Backlog

Consolidate all user stories into a prioritized product backlog. Each item should include:

- A brief description.
- Priority level (e.g., High, Medium, Low).

Step 5: Create Sprint Backlogs

Select a subset of the product backlog items for the first sprint. Break them down into smaller tasks and estimate their completion time. Use story points or hours as estimation units.

Example Sprint Backlog:

- Task: Build a basic shipment tracking page – 8 hours.
- Task: Create the database schema for tracking data – 6 hours.

Submission Requirements

Your submission must include the following:

1. A document listing all identified user stories.
2. Detailed use cases for each user story.
3. A product backlog.
4. A sprint backlog for Sprint 1.
5. A brief reflection (200-300 words) on the challenges you faced while translating the client's requirements into Scrum artifacts.

Deadline

Please submit your completed tasks as a report by 1/12/24 on the course portal.