Willson Financial – Team Delta:

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Tables all look good, with the correct formatting. I was only able to make my list reflect this format by adding an argument to the db.connect() initialization, changing it to db.connect(dictionary = True).

Good layout in each slide, there is consistency throughout the presentation.

Tables are arranged on the same side for each slide referencing them.

The tables and the ORD are all readable.

ORD has adequate detail, though there could be a bit more diversity in the connection between them.

Nice touch giving the average of the total client transactions list.

Assumptions are plentiful and are geared towards the business goals and risks.

For the “Report #1” perhaps it could be beneficial to include the ‘order\_id’ from the Transaction table for reference.

Also, it may be easier to make a business decision by including the amount of revenue gained by each client with over 10 transactions.

This last suggestion is merely to provide volume to the content and is not particularly necessary, which would be add multiple time frames to the clients with 10+ transactions within 6 month period. Example would be the most recent 6 month cycle, and the previous 6 month cycle. More information is always better.

Are the 6 Clients only making transactions of $1.81 on average? There are an average of 38.75, (if the number under ten is near 5.5 (as I used the average of 1-10 not knowing the last client’s number of transactions)).

Assumption that the owners want a way to pull information to query events was provided within the case study.

Employee: emp\_id(Key), emp\_name, emp\_pos.

Client: cl\_id(Key), cl\_name, cl\_address, cl\_phone, cl\_email, cl\_date\_added, emp\_id(Foreign[Employee])

Transaction: order\_id(Key), client\_id(Foreign[Client]), stock\_id(Foreign[Stock]), order\_date, order\_shares\_traded, order\_unit\_price

Stock: stock\_id(Key), stock\_symbol, stock\_current\_price