Questions for client meeting:

First ask what exactly they want and build off from our questions

How would you explain the tables/excel in your own word? (So, we can get a general idea how their thought process works)

* The names of the people, when they join, the career level, location, what contrct they are allined( has to be very accurate) she wants the tractility, changes in data, how much they are billing every month, they want to have a automatic calculator,
* Billing is tied to a particular role, knowing how much they can bill, reason why not billing?
* Understanding how the money is transfer from one contact to another
* How do you manage when to bill something(she put note who is waiting for the the bill,
* WBS:
* We have to keep track of our resources
* Diffente page for the LCR and being able to calculate it
* Forecast what is that exactly, expected billing
* If someone leaves we want to know if they are active or not
* Contact tabs: active, who is the team led, have an automatic update on

What is the excel sheet like? (How do they navigate it)

* Updating, automatic or self input
* Tab in resource that has lead tabs in each contact ( can We minimize the tabs for multiple each person with multiple contact as leads)

What is your vision?

* Contact in a separate part , and each contact data have their separate assigned , an assigned a WBS to an specific contact
* Being able to know what WBS goes to what contact, a “table with a guide to what WBS belong to what contact(could have multiple but never retire?)”
* Tracking wbs to prevent wrongful use of location

What is your current base foundation?

Is there an organization structure/order preference, and if so, what? (How do they want the data organized)

Are there repeat values? Are there many places where you type the same information over and over, I.e., do you see useful areas to group by? How can we make this more concise?

* She controls the current data(priority)
* When searching value: filter by contact not by other things, and show when a person joined to know how much to bill a client
* another person who adds new data or expected new people (we would have to see)

Do you already have separated values?

What do you usually search for? (So that we can make this search as easy as possible in our structure)

What are some things you want to see in this program? What is priority to display and what isn’t a priority to display?

What are something you absolutely do not want to see in the program?

What they want to store in in each page? (Updating new data)

Any other specific details that you might want to give us?

Forecast section and then an actual section

Forecast is an general idea how much we will billing, while the actual section is all the updated dated data,, and what will be used

Visibilyt expected revenue, to calculate the data at the end

A dashboard show the dat a certain way

Privacy of program, on few select who can access, can we restrict data for certain people,

Tracesibiliy, historically circle data, track back to changes on what happens

Start as a data entry program, and then updating the data, etc.

From resource to contract in for that we want to see

A separate for contract and their billing

A separate Contact that get information added