Organization: Greater Washington County Food Bank

Partner: Jon Schubert

Team Members: Shalini Rao, Blythe Weng, Max Dunaevschi

Project advisor: Professor Barrett

[Project community partner meeting notes](https://docs.google.com/document/d/1GxIlVwTtsn3eNmL2yw0P6RYenS8n_-kTUpjP1brqUG0/edit?usp=sharing)

[Last week's notes](https://docs.google.com/document/d/11YoKaZBA_tBrTSG7RxNhxOqvPGr95Wanu4wRbhkRWrk/edit?usp=sharing) (Friday 04/09)

We only had one meeting since the last sprint report, since we were switching back to Friday meetings.

[URL to the team’s project plan (updated on a weekly basis)](https://github.com/mdunaevs/GWCFB/projects/1)

Kanban board on GitHub

Here's the repository just in case: <https://github.com/mdunaevs/GWCFB>

Date: 4/12/2021

Friday 9th Meeting Agenda:

1. Go over Sortly functionalities we have gone through so far
   1. Desktop version
   2. Mobile application and scanning function
2. Discuss outcomes moving forward
3. Answer any questions

Upcoming 04/16 Meeting Agenda (tentative)

1. Do a Zoom walkthrough of functionality we have figured out from the list sent to us
2. Answer/take any questions about the software
3. Clarify expectations and target audience for training guides

Sources:

<https://www.gwcfb.org>

<https://www.foodhelpers.org/>

<https://www.pittsburghfoodbank.org/>

Time Split Overview

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Blythe** | **Shalini** | **Max** |
| Answered additional questions/concerns Jon had about the different software options | 1 hr | 1 hr | 1 hr |
| Project Team Discussion | 1.5 hrs | 1.5 hrs | 1.5 hrs |
| Tested the functionality of Sortly | 4 hrs | 4 hrs | 4 hrs |
| MVP presentations | 1.5 hrs | 1.5 hrs | 1.5 hrs |
| Update project plan/sprint report | 1 hr | 1 hr | 1 hr |
| Create Client Meeting Agenda |  | 0.5 hrs |  |
| Kanban update |  |  | 0.5 hrs |
| Client meeting | 1 hr | 1 hr | 1 hr |
| **Total Hours** | **10 hrs** | **10.5 hrs** | **10.5 hrs** |

**1. Accomplishments Since Last Sprint**

Summary:

These past 2 weeks our tasks focused on nailing down a single software to move forward with and begin testing out the functionalities of it. After Jon chose Sortly we began to play around with the software and figure out what was possible to do.

* Answered additional questions/concerns Jon had about the different software options
  + After presenting a comprehensive list of features of the 3 different software options (HandiFox, Sortly, Foodbank Manager), Jon had come up with other questions/concerns that we had not covered in our client meeting. Some of these questions came up when he was consulting with one of the members of the board of directors. We each conducted more external research (calling software support teams, online research) to help address all of these questions to make it easier for him to make a decision that would work best for the organization. In the end, Jon ended up choosing Sortly which we have already started testing out. (Blythe, Shalini, Max, 1 hr)
* Project Team Discussion
  + We met together as a team to go through all that we have done for the project so far as well as plan additional steps on how to proceed with implementing the Sortly software. In this meeting, we created a joint free trial Sortly account and went over different basic functionalities we should test and show Jon during our next client meeting with him. We also made a plan to document all of the Sortly functionalities after getting familiar with using the software. Because we did not have an advisor meeting last week, this meeting served as a good way to see all of our progress and helped us clear up what we needed to focus on next. (Blythe, Shalini, Max, 1.5 hours)
* Tested the functionality of Sortly
  + After we had spoken with Jon and he decided to move forward with Sortly we started their free trial (14 days). We began by accomplishing basic tasks that would be required for the food bank. For example, we found out how to add an item to the inventory, generate a new QR code, update the inventory values, create assemblies, as well as just messed around with the platform. We then presented this to Jon during our meeting and he was very happy about it. He could tell it was an easy software to use. We also asked Jon to create a list of actions that we should find out how to do. Some of the actions we were missing was stuff like reporting and receiving shipments. Once we figure out how to complete all the required actions we will begin to create documentation for how to do them. (Max, Shalini, Blythe 4 hours)
* Presented our MVP
  + In class we presented our MVP. During our presentation we talked about project overview and key client needs, inventory software analysis, and the final decision of Sortly. We also listened to other teams MVP presentations and provided feedback when necessary. (Max, Shalini, Blythe 1.5 hours)
* Create Client Meeting agenda.
  + As part of the PM role, Shalini created a client agenda which was sent to Jon the night before. This was very useful because it led to a more detailed discussion, since Jon was prepared with all the information we needed. (Shalini, 30 min)
* Update Kanban Board
  + Update the kanban board to show our current and future weekly tasks. This is important in helping us stay on top of our tasks. (Max, 30 min)

**2. Blocks and Problems**

Client

* If Jon ends up not liking the chosen solution Sortly or is unable to keep paying the monthly fee. This will set us back because we have already spent a lot of time conducting in depth research and software testing for Sortly and we would essentially have to start over, or Jon would be left at square one with Quickbooks.
  + We have already shown Jon features of the Sortly Software and he expressed excitement about the product.
  + Jon also stated that the organization was able to afford Sortly’s current pricing and the other solutions we plan to present to him have similar pricing
  + He had spoken to his manager and together they made the decision of the software, therefore it is also backed up by Jon’s boss, meaning they like the solution.
* If there is no efficient way to complete an action in Sortly, the net gain from changing software for Jon will be nearly nonexistent.
  + We are working in Sortly to try to find even a workaround solution to make sure each desired functionality is possible.
* There is a transition happening in June, so the inventory database will be moved after our time is up. Jon will be paying for two softwares but will only be utilizing one (QuickBooks) until the upcoming transition takes place.
  + Jon can wait to subscribe to Sortly, or time his free trial so that he has time to set up the database without paying for it and then transfer the data when the transition happens in June.

Team

* Concerned about the capabilities of the selected software.
  + When we were presenting our solutions to Jon we thought that FoodBank Manager was the best option for him since they had built-in functionalities for everything he wanted. During a meeting a few weeks ago he said that he was leaning towards this software, but would speak to his manager to confirm. Afterwards, he changed his mind and picked a different solution. We are not 100% sure on how to complete some of the actions he wants in Sortly, but we will mess around with the software and try our best to figure it out. If we get stuck or cannot figure out how to do something, we plan on calling the customer support desk and asking for their help. This will not only help us figure out how to do that action, but will also be beneficial in learning how good the support system for the software is.
* Concern about filling the next 3 weeks
  + We have selected a software and begun playing around with it. Jon has been very particular about us not transferring data or really doing anything else besides finding the new software. We are planning to use the next few weeks to create training guides for him and the employees, but we are concerned we will have extra time and not know what to fill it with.

**3. Goals / Targets for the Next Sprint**

Summary:

Next week our goals mainly focus on continuing to play around with the Sortly software and figure out how to do all the actions Jon asks for. Once we figure them out we want to start working on creating documentation for the software.

**Priority**

* Finish figuring out how the actionable items that Jon wants (Max, Blythe, Shalini, 3 hr each)
  + Now that we’ve narrowed down to one solution, and began playing around with the basics of the software we need to prioritize the harder actions that Jon might need to do. Some of the more complicated actions that he wants us to figure out how to do are categorize food based on different vendors / customers, how to update system inventory counts for when a new shipment arrives, generate reports for specific items and inventory in general, create assemblies, and quickly acquire a count for how many available boxes of items there are. These actions are important to figure out how to do, since they are the main ones that Jon will be doing with the software. Especially since we won’t be supporting the project once we leave it is important to figure out how to do them so that our client does not need to.
  + Work will be split up so that each of us takes a task that Jon sends us and writes documentation. (list has yet to be sent so work hasn’t been split up yet)
* Work on documentation for software (Max, Blythe, Shalini, 3 hr each)
  + We plan to work on documentation for the Sortly software. This will include written descriptions, images, and videos on how to do certain things within the software. Since we will not be available for support or maintenance after the project is done, we need to be sure he is satisfied with the solution he chooses and can get help if necessary on his own. This will help the client know how to do certain actions, as well as being able to distribute this information to other workers that might use the software. Furthermore, when we are no longer working on the project they can always go back and check the documentation if they do not remember how to do something.
  + Work will be split up so that each of us takes a task that Jon sends us and writes documentation. (list has yet to be sent so work hasn’t been split up yet)

**Admin**

* Update Kanban Board - Since we will have a final solution that Jon has decided on by early this week, we can shift our efforts to building out the solution for Jon to populate with his own data. (Max, 30 mins)
* Create client meeting agenda - This was a successful task from last week that helped focus our meeting with Jon and made it more effective and efficient. (Shalini, 30 mins)

**4. Community Partner Relationship**

We have consistent weekly meetings with Jon Schubert where we ask him questions to help us gain a better general understanding of how the technology of his organization works and what he wants implemented/changed with the system. We have a good relationship with Jon as we meet and communicate on a regular basis with him. He has also been extremely helpful with answering any clarifying questions we may have and is quick to respond to any emails. Lastly, we have established common ground with him that his available hours are from 7am-3pm on week days and make sure to schedule meetings, send emails, etc. during that period of time.

We focused on understanding the Sortly software and learning more about the functionality through the free trial. We presented our initial findings / functionalities of Sortly to Jon and asked for his feedback. We had a bit more small talk at the beginning and learned more about Jon as a person to further improve our relationship with him.

Metrics:

Meeting 10/10 - We presented the Sortly software to Jon. We shared our screen and showed him how to complete basic inventory actions and answered questions as we went along. After we showed him the basics of the software we asked for more actions to figure out how to do in the software.

Responsiveness 10/10 - Jon is fast at replying to any questions we may have between his work hours, so we make sure to get any emails to him in that timeframe. (7am-3pm)

Productivity 10/10 - We create agendas for our weekly meetings so we have a set plan of what we need to discuss. Jon is aware of the plan for the meeting beforehand and comes with information prepared if it’s needed.

Clarity 9/10 - We have pretty much nailed down what Jon wants out of the new solution, but there is still a little wishywashy-ness. So we asked Jon to send a comprehensive list of actions that we should figure out how to do on Sortly. This will ensure we nail down expectations for what we need to do and figure out for the upcoming weeks. This way we also know we are completing exactly what he wants and ensuring the software can support those requests.