# Introduction & Executive Summary

After submitting last week’s memo, the executive board has decided to move forward with this database project. As we move forward, I have begun conducting interviews with critical stakeholders in this project. This progress report will focus on an interview with National Investment’s Chief Investment Officer, Alexandra. The purpose of this interview and subsequent report is to establish a working mission statement for the new database project to begin with; to find more descriptive and relevant interview questions; establish some of the initial features for this project; and establish a list of questions to employ with future interviewees.

# Mission Statement:

The purpose of this database is to provide timely and accurate information to our investors, clients, and team members; to allow them to see account performance and balance; to generate monthly, quarterly, and annual compliance reports; and to aid National Investments in drawing more insight from our client data and deliver more value to our partners and teams.

# Three questions I should have asked in the interview:

1. How do you envision the analytics dashboard?
   1. How do you want to see client data presented?
   2. What level of detail do you want to see on this dashboard?
2. What metrics will we be tracking with client accounts?
3. Can we establish layers of data that certain people don’t need access to, and control user permissions?

# Five Data Tables:

1. Investment portfolios – This table will hold information about each investment that National Investments holds.
2. Compliance Reports – This table will serve as a record of past generated monthly, quarterly, and yearly compliance reports.
3. Clients – This table will hold all of our client’s information in one centralized easy to access place.
4. Team members – This table will hold all information relevant to team members, it may be utilized by managers and HR.
5. Credentials – This table will hold our clients and team member’s tokens, log-in credentials, and 3rd party licenses.

# Seven questions to ask during an observation session with client managers:

1. How are you tracking your 3rd party credentials & licenses?
2. How are you tracking your in-house credentials?
3. How are you generating your compliance reports currently?
4. How are you sharing performance data with your clients?
5. What level of detail would you like out of an analytics dashboard?
6. How comfortable are you with technology and adoption of new technology?
7. What do you need to be empowered to do a good job?

# What do I hope to get out of this observation session?

I would like to better understand the client managers and how they do their duties, gauge their technological literacy, and understand how I can better architect this system with this stakeholder in mind.

# Conclusion

This progress report established a preliminary mission statement of how this project will deliver value and insight to our clients and team members. It addressed topics of the interview with Alexandria that could have been better articulated. This report began listing criteria for five initial tables of the database and explained why they are important. It ended with establishing another subject to observe and detailing seven questions to ask them and what can be gained from this observation session.