

# Minutes of Meeting (MoM)

---

Meeting Date/Time: 5th Sept 2025, 11:00 AM – 12:30 PM

Location/Mode: Virtual – Microsoft Teams

Attendees:

- Prashant Gavhane (Business Analyst – Facilitator)
- Product Owner – Wealth Management
- Compliance Officer
- Tech Lead (Backend)
- QA Lead
- Operations Manager

## Agenda Items

- Review progress of project deliverables (Enterprise Analysis, BRD, FRD, SRS).
- Discuss requirements traceability and RTM coverage.
- Identify pending gaps before UAT phase.
- Plan next steps (Test Case Documentation, UAT Prep).

## Discussion Points

- All major documents (Enterprise Analysis, Project Charter, BRD, FRD, SRS, RTM) completed and reviewed.
- Shared Excel sheet linking BRD → FRD → SRS → Test Cases. Needs QA validation.
- Architecture, DFD (L0 & L1), ERD approved by Tech Lead.
- KYC/AML screening SLA dependencies with vendor API still a risk.
- Draft Ops Dashboard wireframe reviewed; Ops Manager requested adding 'exception escalation' workflow.

## Decisions Made

- RTM to be used as baseline for UAT planning.

- All requirements marked Open in RTM will be targeted for closure before next sprint demo.
- Compliance vendor API team to be contacted for SLA clarification by next week.
- Ops Dashboard workflow changes to be incorporated in FRD addendum.

### Action Items & Responsible Stakeholders

| Action Item  | Owner                       | Due Date  |
|--|-----------------------------|-----------|
| Validate RTM entries and align with test scenarios | QA Lead                     | 10-Sep-25 |
| Confirm API SLA with Compliance vendor             | Compliance Officer          | 12-Sep-25 |
| Update FRD with Ops Dashboard exception workflow   | Business Analyst (Prashant) | 08-Sep-25 |
| Prepare draft Test Case Document (Excel)           | QA Lead + BA                | 15-Sep-25 |

### Next Steps

- Finalize Test Case Document.
- Begin UAT Prep with stakeholders.
- Update project plan with revised dependencies.