2025-01-14

Notes on Client meeting 1:

**General Objectives**

1. **Key Goals**
   * What are the top priorities for the CRM? (e.g., managing member data, streamlining communication, automating processes).
   * Needs:
     + Simple, functional, cost-effective, and customizable CRM.
     + Track conversations via email or phone calls.
     + A robust contact page to track who comes and goes.
     + Filters to identify contacts from specific companies (e.g., "Who is my contact at Company ABC?").
     + Generate a list of people fitting a category, with the ability to view and export the data to Excel.
     + Summarize data, including the number of members, GDP, revenue, and number of employees.
2. **Pain Points**
   * What specific issues or challenges are you facing with the current system?
     + Data is incomplete, fragmented, and inconsistent.

**Data Management**

1. **Existing System**
   * Can you provide a walkthrough of the existing Airtable setup, including key features?

Airtable demonstration (Do not reproduce this data. Keep it confidential)

A screenshot of a computer

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A computer screen shot of a computer screen

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* + Are there common issues with duplicate or outdated data that need to be addressed? No. But it would be nice to highlight the duplication or incomplete information.

**Features and Functionality**

1. **Automation Needs**
   * Are there specific tasks or workflows you'd like the CRM to automate? Examples include:
     + Membership renewals.
     + Tracking members not in good standing (clients who are past their due to membership will be not in the good standing).
     + For now the changes in the members profiles are done manually.. so, automation is required.
     + A button to delete members (to avoid manual backend removal).
     + Notifications for member changes on the website (e.g., address updates).
     + The website is WordPress-based, with static data, but members can update their own information.
2. **"Must-Have" Features**
   * Ability to archive members as needed.
   * Uploads: Excel files and logos.
   * Download member information in Excel format and/or pdf.
   * Robust contact management:
     + Track who comes and goes.
     + Filters for identifying contacts from specific companies.
     + Summarize data (e.g., number of members, GDP, revenue, and number of employees).

**User Roles and Permissions**

1. **User Access**
   * Who will use the CRM? (e.g., staff, administrators).
   * Should there be different levels of access or permissions?
     + Jordan is the only formal employee.
     + A board of 12 directors should have read-only access.
     + Third-party providers may require limited permissions.
     + Temporary access functionality: Grant and revoke access (e.g., for a month).

**User Experience**

1. **Design Preferences**
   * Happy with the brand, logo, and red-and-white color scheme on the website.
   * Would like to change the font to a more industrial style.

**Reporting and Insights**

1. **Data Access**
   * How often do you need to retrieve data quickly, and in what format?
     + Downloadable Excel files or on-screen summaries are preferred.

**Long-Term Vision**

1. **Admired Platforms**
   * Microsoft Dynamics is admired for its integration with the Microsoft Suite and user-friendly interface.
2. **Success Metrics**

* How will success for the CRM be defined once the project is complete?

1. **Contact Flexibility**

* Could the same person act as a contact for multiple members?
  + Yes.

1. **Jordan’s Availability**

* Work hours: 8 AM to 5 PM, but emails are acceptable at any time.

1. **Real Data**

* Use Excel sheet information to generate fake data using AI for now.
* Faculty and client will discuss whether the client can provide real data or more detailed information (e.g., types of industries, types of membership).

1. **Specific Pages**

* Would like users to engage more on the website.

**Nice-to-Have Features**

* Invoice tracking: Link to QuickBooks Online and integrate accounting information.
* Mobile support.
* Bilingual support (English and French).
* Track attendance at events.
* Marketing and communication:
  + Send emails to specific groups.
  + Avoid spam perception (e.g., avoid MailChimp).
* Data backup: Currently no backup system, but would like one implemented.
* Pictures: Optional, if not time-consuming.
* Member profile pages.
* Customizable dashboard with key sections information's..

**Exclusions**

* **Payments**:
  + No payment processing required (handled by another software).
* **Data Visualization**:
  + No need for charts or graphics.
* **Sales**:
  + No selling functionality required.