Criterion A: Initial investigation

Summary of Problem:

My father, Keith Davis (client), works as an accountant for Wells Fargo as part of the State Tax Team. He is having a difficult time manipulating state tax data in an efficient manner. He needs to have various data categories aggregated for each individual state as quickly and efficiently as possible to perform his job properly.

An interview was conducted in person on 4/20/21 with Keith.

Explanation of inadequacies of current situation:

In the interview, Keith stated that he has tried two different methods in his current situation. The first method was manual manipulation. Keith said that manually manipulating the data took far too long because it required him to do the mathematical calculation himself.

The second method that Keith used was Microsoft Excel. Keith said that the program did help with efficiency, but it still required too much of his involvement. He stated that even though the spreadsheet can do the data sorting for him, he has to manually transfer the data from every spreadsheet he receives, which wastes time that he could be spending elsewhere in his occupation. Keith says that he receives lots of excess data that is not relevant to what he does. He stated that he needs a program that can take multiple spreadsheets and aggregate the data he needs, specifically sales, payroll, and property, in order to calculate particular aggregation rates of his choosing per state.

Word count: 228