📝 Notes

Jun 23, 2025

## onboardIQ - next steps Discuss functional Specs For automation platform

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Attachments [onboardIQ - next steps Discuss functional Specs For automation platform](https://www.google.com/calendar/event?eid=N2kwcGJ2a3Zsa2NrdXJtbzZubmUzaDU1MDIgdHJhbXNheUB2ZXJzYXRpbGV0cy5jb20)

Meeting records [Transcript](?tab=t.5zf5fdpvw8sk)

### Summary

Tayler Ramsay outlined a new approach focusing on specific user roles (e.g., Melissa, Amanda, Bill, Max) to gather insights for the automation platform by conducting interviews with a prepared set of questions, aiming to understand their needs and pain points. Tayler Ramsay will ensure all relevant Confluence pages and shared documents, including a roadmap and project charter, are accessible to Rafael Alves and Martha to facilitate collaboration. The team will review the structure of Amanda's interview to develop questions for upcoming interviews with various user roles.

### Details

* **Project Focus and User Roles** Tayler Ramsay outlined a new approach for the next iteration, focusing on the automation platform and breaking down the "versatile admin" role into more specific roles ([00:00:00](#_eh65k13iftad)). The goal is to conduct a detailed analysis of different people within the company, assigning them roles such as those at the level of Melissa and Amanda, individuals like Tayler Ramsay, Bill, and Cheyenne, business analysts, and business people like Max, the finance lead, as well as sales representatives ([00:00:51](#_22zbfgssoyw0)). These roles will help in understanding various perspectives on the platform.
* **Gathering User Insights** Tayler Ramsay explained that the next step involves creating a list of characters (users) and questions, followed by interviewing each of these individuals to understand their needs and pain points ([00:01:58](#_mcvoje5jnzdl)). The questions will be developed collaboratively with Rafael Alves and Martha. This process aims to gather requirements for the automation platform, with Tayler Ramsay offering to create wireframes for better visualization ([00:03:01](#_kslkt243a71e)). The interviews will help uncover what different users, like Max, care about regarding timelines and the process ([00:04:06](#_8mv3zo9c438a)).
* **Confluence Page Management** Tayler Ramsay mentioned creating several Confluence pages and wanting to ensure they are accessible in the spaces used by both their team and Rafael Alves and Martha's team. Due to access limitations with the keys QA space, Tayler Ramsay decided to copy the information and create it in both locations ([00:12:21](#_320cmclpv0ga)). Tayler Ramsay showed a roadmap and a project charter in Confluence as a starting point for discussion ([00:13:47](#_j6oo4racwzc3)).
* **Defining Functional Specifications** Tayler Ramsay emphasized the ultimate goal of creating functional specifications that detail how the application needs to work. To achieve this, the team will first focus on understanding the users and how they will interact with the app ([00:15:36](#_mba1nc7vwqgg)). Martha suggested that the initial insights into pain points might need to be more specific. Tayler Ramsay proposed starting by selecting three user roles and developing initial questions for them ([00:16:58](#_tesu7ordf0f4)).
* **Identifying User Pain Points** Tayler Ramsay suggested starting by interviewing Max, the finance lead, to understand his pain points, as his needs might be less obvious ([00:18:20](#_o0u5s94lne0a)). The discussion highlighted the importance of identifying what information is most relevant to users like sales representatives at different stages of the merchant onboarding process ([00:19:46](#_f8vzk7nssd69)). Rafael Alves suggested that users likely already recognize their pain points within existing processes ([00:24:31](#_wrsz4f3o1uuo)). Tayler Ramsay clarified that for stakeholders less involved in the current onboarding process, the focus will be on understanding their need for data and insights, using the example of wanting to know why an integration took longer than expected ([00:25:45](#_6dwrui2kuylp)).
* **Interview Strategy and Preparation** Rafael Alves suggested interviewing both stakeholders and end-users to gather comprehensive insights ([00:26:54](#_4c2we2tqln4a)). Tayler Ramsay confirmed that the list of 15 names includes the target users for these interviews. Rafael Alves inquired about having an overview of each user's process before the interviews ([00:27:53](#_ngrkk565mrhv)). Tayler Ramsay clarified that the interviews themselves will serve to understand these processes, similar to user interviews conducted previously ([00:28:41](#_mmg3orcesmnq)). While open to organic conversations, Tayler Ramsay wants to have a set of key questions to ensure specific information is gathered ([00:29:57](#_njrhamd5zwcs)).
* **Leveraging Existing Interview Data** Tayler Ramsay proposed reviewing Amanda's interview, as she interacts with the process at various points, to help formulate better questions for future interviews. Rafael Alves inquired whether Amanda's interview was recorded or just documented ([00:30:56](#_l4wgm0km94x3)). Martha shared a Word file containing the documented interview ([00:32:21](#_41d3pknv9bn)). Rafael Alves noted that the documentation of Amanda's interview was organized by responsibilities, work environment, habits, insights, and quotes ([00:35:35](#_wyt0t1f948hh)).
* **Interview Logistics and Timeline** Rafael Alves asked about when the interviews would commence. Tayler Ramsay clarified that the timeline depends on the three of them developing the plan, with the aim of having functional specs for Bill within a few weeks ([00:36:48](#_159nwhf8z5gy)). Functional specs were defined as documents combining technical approaches and business requirements. Tayler Ramsay suggested using the structure from Amanda's interview as a template for developing basic interview questions for other roles, such as a salesperson and a financial person ([00:38:00](#_3e6k4sqr7dno)).
* **Interview Confidentiality and Approach** Rafael Alves inquired about the interviewees' awareness of the project. Tayler Ramsay assured that the interviewees will know what the interview is about to avoid wasting their time ([00:40:13](#_3drkf1yxy379)). The goal is to have prepared questions while still allowing for organic discussion to gain insightful responses ([00:41:01](#_eesd0c99m4mx)). Rafael Alves confirmed that the structure used for Amanda's interview was how the notes were organized ([00:42:06](#_4erukxx31anw)).
* **Interview Duration and Focus** Rafael Alves asked about the expected length of the interviews. Tayler Ramsay suggested aiming for around 15 minutes to respect the interviewees' time. This short duration necessitates being well-prepared with questions ([00:43:07](#_598sxarxdvns)). The next steps involve reviewing the structure from Amanda's interview and creating a set of questions for the different roles within the application ([00:44:04](#_uaam65nfba6u)).
* **Confluence Access and Collaboration** Rafael Alves reiterated that their team does not have access to the Confluence page Tayler Ramsay's team is working on ([00:44:04](#_uaam65nfba6u)). Tayler Ramsay confirmed this and stated they would move everything to a space accessible to Rafael Alves and Martha ([00:45:10](#_9n34iebomq7e)). Attempts to move or copy the content between Confluence spaces faced technical difficulties, likely due to security settings ([00:49:12](#_1jg5lruk7cky)). Martha explained how she previously created what appeared to be folders by creating pages and moving them under a main title. Tayler Ramsay found this method and was able to create a project space in Confluence ([00:55:24](#_5q2i8zru9fko)).
* **Document Sharing and Review** Tayler Ramsay shared documents related to onboarding, a project charter, and a roadmap, including a Fig Jam link. Tayler also intended to add notes from a previous chatbot interaction and the current meeting to the shared space. Rafael Alves confirmed they could see the initial documents, and Martha confirmed visibility of the page as well ([00:57:34](#_6xi7cgwejucg)).
* **Next Steps and Timeline** Tayler Ramsay proposed a follow-up meeting either later this week or next week to discuss interview questions. Rafael Alves suggested that they and Martha would assess the task during the afternoon and then provide Tayler with a timeframe for when they could get back to them. Tayler agreed to this plan ([00:57:34](#_6xi7cgwejucg)).

### Suggested next steps

* Tayler Ramsay will add the notes from the chatbot and today's meeting to the document.
* Rafael Alves and Martha will assess the task this afternoon and inform Tayler Ramsay about the next meeting.

*You should review Gemini's notes to make sure they're accurate.* [*Get tips and learn how Gemini takes notes*](https://support.google.com/meet/answer/14754931)

*Please provide feedback about using Gemini to take notes in a* [*short survey.*](https://google.qualtrics.com/jfe/form/SV_9vK3UZEaIQKKE7A?confid=4PoJ-Jj-NZSsmgxcEyYhDxIWOAIIigIgABgBCA)

📖 Transcript

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### 00:00:00

**Rafael Alves:** lunch. Why? My camera is off.  
**Tayler Ramsay:** That's  
**Rafael Alves:** So,  
**Tayler Ramsay:** okay.  
**Rafael Alves:** I hope  
**Tayler Ramsay:** No,  
**Rafael Alves:** you don't  
**Tayler Ramsay:** we'll  
**Rafael Alves:** miss  
**Tayler Ramsay:** be  
**Rafael Alves:** me.  
**Tayler Ramsay:** okay.  
**Rafael Alves:** I know that not seeing me is really  
**Tayler Ramsay:** It's difficult.  
**Rafael Alves:** sad.  
**Tayler Ramsay:** It's  
**Rafael Alves:** So,  
**Tayler Ramsay:** difficult. It's hard to  
**Rafael Alves:** yeah.  
**Tayler Ramsay:** It's hard to move forward like this. No.  
**Rafael Alves:** Yeah, I I understand, but and  
**Tayler Ramsay:** Yeah.  
**Rafael Alves:** I apologize. It's just that I'm having lunch. It's 1 pm here,  
**Tayler Ramsay:** Oh.  
**Rafael Alves:** so  
**Tayler Ramsay:** Oh. So, you're only an hour different. That's because it's 12 here. Okay. Well, so what I was going to do is kind of I have some I think a better framework for moving forward on their next iteration. So what we're going to focus on is the automation platform. So do you know how we've talked about there's the onboarding platform for the merchant.  
 

### 00:00:51

**Tayler Ramsay:** Then there's the aspect of the lenders visual into the onboarding platform. And then we've kind of just said the versatile admin, their view into the platform. So what we're going to focus on is breaking up the versatile admin because there's different roles under that that we still need to surface. So this is great. This is a good place I think for us to start. So pretty much what we're going to do, the work I did to get the three user stories that we've have so far, we're going to redo that same type of work, but now we're going to do a more detailed analysis of people in the company. Um, I have Gemini taking notes, so don't worry, I'll forward all this to you. So, at a high level, I'm going to use names, but it would be great if we can assign them roles. So, there'll be the level of Melissa and Amanda. They have a role, but then there's going to be like me, Bill, Cheyenne. That's a level of a role.  
 

### 00:01:58

**Tayler Ramsay:** But then there's also going to be like the business analysts. They're going to have a role. There's going to be people like the business people. So, we have I don't know if you guys know Max. He's our money guy, our finance guy. Regardless, he's going to have a role. He's going to want to have visuals into knowing where things are and what process they're in. Sales reps who actually signed up the So, say we have a new merchant, but a sales rep's how we got that merchant. They're going to want to know where along the flow is. Where's the process at currently with that enrollment? So, what we're going to do is we're going to build roles for all these characters. I'm not saying that we have to do it right the second. I I know I'm just talking now. So, what we'll what the artifact will be is we're going to come up with a list of characters. We're going to come up with a list of questions and then we're going to interview each one of these people.  
 

### 00:03:01

**Tayler Ramsay:** um those questions is going to be something that you and me are going to work out together. So um a lot of this is going to be I need you guys to just help me work out these requirements together. So if I have to build wireframes so that we can visualize what we're talking about, I can do that. Um I think that's kind of how the workflow is going to be right now until for now moving forward. It's gonna um coming up with a game plan. However, we need to figure out like because I I don't assume you guys are going to know how anything works in the app because that would be ridiculous. So, that's also a good thing because it's almost like you need the answers as well. So, for you to know how the app works, that's almost going to help us come up with the questions to ask everyone else. So, whatever questions you're asking as we're doing this, we'll note those questions down as probably questions that we should be asking Max, right?  
 

### 00:04:06

**Tayler Ramsay:** So, Max would be what does Max care about? Timelines. I have no idea. See, that's just it. I have no idea what Max cares about. So, that's why we have to interview him. So, yeah, we've already interviewed Amanda. So, we have that interview already. We I don't think we really need to do that one, but we will need to come up with um so actually go ahead. Do you guys have any questions?  
**Martha:** Not yet. I think we don't know about half of  
**Rafael Alves:** All good here.  
**Tayler Ramsay:** Okay. All right. I'm going to share my screen. I can't spell. Just so you guys both know that. No, it's okay, baby. Come on. Come up here. So, I don't know good names yet. So, just this is a start. Thank these two guys ourselves. So the confluence thing, you guys have it, but you I guess you only have like one page.  
 

### 00:12:21

**Tayler Ramsay:** So another thing I want to do before we hang up today is I created a bunch of pages. I want to transition them or copy them so that they're in both spots. And I don't know exactly where your spot is. So, what I'll have you guys do is before we hang up, share your screen and you can log in to wherever you're able to get to. and we'll and we can move everything then. Does that make sense? Sorry, I'm not looking at you guys. I can only hear you.  
**Rafael Alves:** Yep.  
**Tayler Ramsay:** Okay.  
**Martha:** I'm trying to get the the link, but we have only have access to the keys QA space,  
**Tayler Ramsay:** Yep.  
**Martha:** which was your first screen before.  
**Tayler Ramsay:** Yeah. I that's all I don't know. It sucks. But what we'll do is everything I created, we'll just make a copy and put it in both spots. So like for instance, I could just show you what I've built real quick. I built all I did is I took your work and I I transitioned it over to like I built out a road map in Confluence.  
 

### 00:13:47

**Martha:** Okay.  
**Tayler Ramsay:** Um like obviously right now we're this is where we're focusing in the admin part but and then I I just added the charter. I added a charter. So that was the original overview you sent me here. This is perfect. This is what I wanted. What this will help us do is just get some formatted documentation for us to kind of start talking out who the users are, what's a good strategy for like interviewing them. What's a good strategy  
**Martha:** Okay.  
**Tayler Ramsay:** for documenting all that? What questions do we still need before we can enter? Like before we can even come up with interview questions, what did the three of us need to figure out as a team that we're all on board? Like that's where I want to get to. I want us all three to be thinking exactly the same thing and then move forward.  
**Martha:** Okay.  
**Tayler Ramsay:** Can you guys see my screen?  
**Martha:** Yeah.  
**Rafael Alves:** That's  
**Martha:** Oh, you have a a cat.  
**Tayler Ramsay:** Yeah.  
 

### 00:15:36

**Tayler Ramsay:** Little guy. She's my baby. Reena, say hi. They're talking to you.  
**Martha:** She's so pretty.  
**Tayler Ramsay:** Yeah. Her little sister's somewhere around here. Reena and Rascal. All right. Yeah. See, this is great. I think this is a good starting point. What do you guys think? Are you reading through this at all?  
**Martha:** I'm trying to because it's so small on my screen. But  
**Tayler Ramsay:** Oh,  
**Martha:** yeah, thank you.  
**Tayler Ramsay:** that. Yeah. Gotcha.  
**Martha:** Okay.  
**Tayler Ramsay:** So now we're again remember right now we're building out a plan because what we need to be able to do at the end of all of this is have functional specs that say whether it's the whatever whoever the developer is doesn't matter. um you know this is how the app needs to work functionally. So to get there, we first need to figure out the user, which we're doing right now, and then how they're going to use the app, right?  
 

### 00:16:58

**Martha:** Yeah. Um I think the pain points make sense but but maybe uh we need more. I don't know cuz it those are just insights, right?  
**Tayler Ramsay:** Exactly.  
**Martha:** So  
**Tayler Ramsay:** All of this is just insights at this point. So, let's start with then let's pick three people and then let's start hashing out what we would want to ask them and then maybe that'll start making us ask what we need to know, right? like would would it help for me to pull up the UI because in essence we wouldn't normally have a UI yet. So this is good. I feel like we're starting where we should be like we don't have a visual yet. We know that we have what we want to do is track how the application is coming through where it's at at any given time. And we need to figure out now what these different users are going to how they want to use how they're going to want to use a tool like that.  
**Martha:** Yeah.  
**Tayler Ramsay:** So I personally would think let's pull out three of the roles, right, and set up questions that we would want to start asking them.  
 

### 00:18:20

**Tayler Ramsay:** And then maybe that'll have you guys ask me questions about because I I mean I  
**Martha:** Heat.  
**Tayler Ramsay:** know how the app's supposed to work. I know Bill knows how, but I know you guys it'd be impossible for you guys to know. So  
**Martha:** Yeah.  
**Tayler Ramsay:** maybe you guys will start asking questions about the app, which would just help.  
**Martha:** Okay.  
**Tayler Ramsay:** Alpha  
**Martha:** I'm trying to think. So I would start asking about the pain points because uh those are too general. Maybe we need to know more specific things I think.  
**Tayler Ramsay:** Now, when you say ask more specific to the actual person, right?  
**Martha:** Yeah.  
**Tayler Ramsay:** So, I'm thinking let's pick let's pick Max to start. Max because he's like he's like an anonymally because he just cares about money. He's the money guy, right? So  
**Martha:** Ian.  
**Tayler Ramsay:** like what are his pain points? I have no idea. Go ahead. What were we saying?  
**Martha:** Sorry, my dog is making a mess, so I had to mute my  
 

### 00:19:46

**Tayler Ramsay:** That's okay. No,  
**Martha:** my  
**Tayler Ramsay:** you're good. Yeah. See, this is a good step forward here. I'm going to start moving all these  
**Martha:** Yeah.  
**Tayler Ramsay:** Oh, that's another thing. Readon path. We have to map out a readonly path. See, that's good because so and and sales is perfect. It's those people who don't have any technical need for it. It's  
**Martha:** Yeah.  
**Tayler Ramsay:** more just about data, right? Again, using the example of like the sales guy who wants to know how far along the integration is, how far are we in the process, if there's an issue, why is there an issue? Right? That's what this tool is meant for. This tool is meant to allow that sales guy to log into his section under his user look up his integration which would say as a merchant let's use um just to make it easy Ashley as the merchant. Okay. So  
**Martha:** Mhm.  
**Tayler Ramsay:** we have a new merchant named Ashley.  
 

### 00:21:12

**Tayler Ramsay:** Our sales guy, um, Ed wants to know how far along the integration is. He goes on, he should be able to see, okay, the merchant has signed up, filled out the form, sent in all the required documentation. It looks like it's sitting with one of the there's three lenders on board, but lender C, Synchrony, it's blocked for some reason. Now the sales guy goes in and he sees, oh, it's blocked because Synchrony were missing their API key and they haven't given it to us because they told us whatever reason. So like to me being from an outside and making a lot of assumptions that's what a salesperson might want right but  
**Martha:** Yeah.  
**Tayler Ramsay:** but what we need to figure out is what do our sales people really want? So what kind of questions should we ask our sales internal sales rep? like should we come at it with hey we're building this app it's an automation tool right I guess like like what is the uh dialogue right what's that would start the interviews we're building this app it's an automation tool that allows anybody at any point with stake in the game to see where the integration is for a merchant onboarding  
 

### 00:22:50

**Martha:** Maybe what are the most relevant informations they need to see as soon as possible like when they open the application? What would be more useful maybe?  
**Tayler Ramsay:** What's most important to you?  
**Martha:** Yeah.  
**Tayler Ramsay:** Right? That type of question.  
**Martha:** Yeah.  
**Tayler Ramsay:** That's good. So like say you're Max Max when we're doing an integration what are the things that are you care about the most and at what stages are they? Are they after the integration takes place? Are they during the integration before the integration right I'm sure people care about different things like developers aren't going to care before the integration they're going to care during the integration. Same with like Amanda. Amanda doesn't care until the integration has already started. To me, that's like a good question. Like, what do you care about the most? What is hard for you? What is hard for you to find now that you wish you could that  
**Martha:** Yeah.  
**Tayler Ramsay:** that's a bad question but you know what I mean like what's hard for you now that like in your mind it seems like it should be something that you are able to discover that you can't now or something like that.  
 

### 00:24:31

**Tayler Ramsay:** It's hard  
**Rafael Alves:** Oh my  
**Tayler Ramsay:** because  
**Rafael Alves:** god, you're so bad at this. No. Yeah. No, it's just that you asking know really confused way. I don't even know what you mean, but it's basically like uh what are the main pain points that you have and how you envision the ideal solution would look like in your  
**Tayler Ramsay:** I guess the thing is they don't know they have these pain points yet. That was what makes it hard. It's like we're  
**Rafael Alves:** probably they do. It's what pain points are about. Like you usually know that this process is like tiring and long and then something that you have in your mind. Usually if you have uh because all these profiles that we are uh separating and trying to put them into a segmentation like this different type of roles. Currently they have a role in the process that the application will resolve, right?  
**Tayler Ramsay:** Yes.  
**Rafael Alves:** Yeah.  
**Tayler Ramsay:** Yes.  
**Rafael Alves:** So  
**Tayler Ramsay:** Yes.  
**Rafael Alves:** yeah, so they probably know that their part is like unnecessarily long or too  
 

### 00:25:45

**Tayler Ramsay:** I  
**Rafael Alves:** bureaucratic  
**Tayler Ramsay:** guess  
**Rafael Alves:** or something like that. uh then we can already talk to them, understand these pain points and know what we do not want in our application if possible. Of course, there are things that we cannot just work around but  
**Tayler Ramsay:** that makes sense. Now, for the user though that doesn't normally, so this is more of like a stakeholder high up that we're gonna we're gonna question. So, they might not be in the process. That's the thing. Currently they don't really aren't involved in onboarding the merchant but he has a lot of want like there's a lot of knowledge and financially for him to know like okay okay let me put it like this  
**Rafael Alves:** Yeah. No, I  
**Tayler Ramsay:** Hellsburg took two weeks right why  
**Rafael Alves:** Sorry. Say it again.  
**Tayler Ramsay:** yeah let me finish Hellsburg took two extra weeks why that's what he wants to And that's what this is going to surface for him.  
**Rafael Alves:** Okay.  
**Tayler Ramsay:** So how do we get like I what you're saying makes perfect sense.  
 

### 00:26:54

**Tayler Ramsay:** We have when it it's easy when the role has already been there but like now we have to interview people like the money people who we got to so I think this is good. That makes sense. What you said makes perfect sense for 90% of everyone because they already know their process, right? They already have a process. They know it. and we're going to automate it. And then for the people who normally aren't involved in this part of the process, they're the readonly people, right? Those are the questions we're trying to figure out. The readonly people, the people who really only care about the data.  
**Rafael Alves:** Okay, got it. But  
**Tayler Ramsay:** No, but  
**Rafael Alves:** I  
**Tayler Ramsay:** we  
**Rafael Alves:** think I  
**Tayler Ramsay:** make sense.  
**Rafael Alves:** I think it's uh it will it will add a lot of value for us to interview the stakeholders of course but I think it will be a good thing for us to interview the final users  
**Tayler Ramsay:** Oh  
**Rafael Alves:** and  
**Tayler Ramsay:** yeah,  
 

### 00:27:53

**Rafael Alves:** the  
**Tayler Ramsay:** that's  
**Rafael Alves:** future  
**Tayler Ramsay:** where we are.  
**Rafael Alves:** users that are going  
**Tayler Ramsay:** Oh  
**Rafael Alves:** to  
**Tayler Ramsay:** yeah.  
**Rafael Alves:** have it may be in different phases. It doesn't need to be in the same one but we probably should do  
**Tayler Ramsay:** Yeah.  
**Rafael Alves:** that.  
**Tayler Ramsay:** So I said beginning that list of names I typed  
**Rafael Alves:** Yep.  
**Tayler Ramsay:** know if you saw that in the very beginning I listed  
**Rafael Alves:** Yeah. Yeah.  
**Tayler Ramsay:** out 15 names. Yeah. That's the users. So like I'm I'm focused right now on Max like what you said is per is exactly right. We we we interview them get their pain points in the process. Now so then what kind of questions would you ask to get those to ask that more than just that one question right?  
**Rafael Alves:** Yeah.  
**Tayler Ramsay:** You come  
**Rafael Alves:** Uh  
**Tayler Ramsay:** more prepared.  
**Rafael Alves:** do we have currently some type of overview about each of their process?  
**Tayler Ramsay:** That's what this interview is.  
 

### 00:28:41

**Rafael Alves:** No, but we don't have any knowledge ahead.  
**Tayler Ramsay:** Well, we have Amanda's and Melissa's, right? So, that  
**Rafael Alves:** Okay.  
**Tayler Ramsay:** that that helps. We don't really need to  
**Rafael Alves:** Okay.  
**Tayler Ramsay:** meet again. But like, no. I don't to be perfectly honest. I I know what Doug kind of does, but I can't sit here and explain to you what Doug does. So, no. So, Doug  
**Rafael Alves:** Yeah.  
**Tayler Ramsay:** and Max and Yeah. Everyone we're going to meet, it's like we're doing user interviews. It's like we're going back and doing it the way we should have did it originally almost, if that makes sense. We're going back now to the users, finding out how they do what they do, what's hard, what's not, what's their pain points, right? And their current process, right?  
**Rafael Alves:** Yes, I think uh with those more generic questions we could guide the interview but the more specific questions would come along with while the interview is taking place like they are all walking us through and And they were like okay do you think this this process that you just mentioned it seems really painful what do you think about that how do you envision that to take place in a improved improved scenario and then this type of  
 

### 00:29:57

**Rafael Alves:** thing I think we could evolve that like right there when while the interview is really taking place  
**Tayler Ramsay:** I'm  
**Rafael Alves:** further  
**Tayler Ramsay:** good with that. I do want to have like 10 bullet points though. I'm totally cool with an organic interview, but I want to have like not 10, but like at least I want to have a set of bullet points that we definitely get answered. You know what I mean? And whether  
**Rafael Alves:** Yeah.  
**Tayler Ramsay:** those  
**Rafael Alves:** No, of course. Yeah,  
**Tayler Ramsay:** Yeah.  
**Rafael Alves:** that that's exactly what I said. We can have like some more generic ones  
**Tayler Ramsay:** Yeah.  
**Rafael Alves:** for starting like to guide to really properly guide the conversation,  
**Tayler Ramsay:** Yep. Yep.  
**Rafael Alves:** but we will like try to evolve each one of those into the rabbit holes that it may open up  
**Tayler Ramsay:** Yep.  
**Rafael Alves:** throughout the conversation instead of coming more prepared because we if we don't envision his pro their process like from end to end yet, it it would be difficult to try to guess and I don't know if it would if it would uh pass the right impression to them.  
 

### 00:30:56

**Tayler Ramsay:** So, I think a good idea would be for us to go over Amanda's interview again because that's one we have documented.  
**Rafael Alves:** Yeah.  
**Tayler Ramsay:** I think because Amanda touches it almost at every point. So, if we go over that interview, read through it, I think that'll help us with better questions. And then like you said, as we go through interviews, we'll know what to ask the next person a little bit better,  
**Rafael Alves:** Yes,  
**Tayler Ramsay:** you know. So, um, yeah, let me what  
**Rafael Alves:** the  
**Tayler Ramsay:** would be  
**Rafael Alves:** inter the Amendas interview you just mentioned we had that do we had that do we have do we have that recorded or only the notes?  
**Tayler Ramsay:** it documented? Not Yeah, I have it documented. Hold on. Somewhere  
**Rafael Alves:** Okay.  
**Tayler Ramsay:** I can synthesize the notes. Just give me a sec if I can remember. Do you have the link of the fig jam I shared you or who the hell is it?  
**Martha:** I I think I have it.  
 

### 00:32:21

**Martha:** Let me send it to you. Have I send the link. here on the message.  
**Tayler Ramsay:** Okay, thank you.  
**Martha:** Oh, okay. You got it.  
**Tayler Ramsay:** Yeah. I thought it was in here. Sorry.  
**Martha:** I I have it on a file. Um,  
**Tayler Ramsay:** Have it. Yeah.  
**Martha:** I think I sent you. Let me see.  
**Rafael Alves:** And in this conversation that you just mentioned, she walk you through what each one of these roles will perform in the application. No, she walk you through what they currently do. Is that  
**Tayler Ramsay:** which  
**Rafael Alves:** it?  
**Tayler Ramsay:** she currently does. Yeah, just her  
**Rafael Alves:** Oh, okay. So just her so just her role.  
**Tayler Ramsay:** but she control. So, let me say she kind of handles everything on this one project. So, she's a good person to know all the steps.  
**Rafael Alves:** Okay.  
**Tayler Ramsay:** Okay. And if we have to interview her again, we can  
**Martha:** Um, I send the the interview on a word file on the messages too.  
 

### 00:35:35

**Rafael Alves:** Yeah, it's already organized. I think uh Tyler organized  
**Tayler Ramsay:** Can  
**Rafael Alves:** that.  
**Tayler Ramsay:** you just email me the file? Not through Don't do it through Microsoft. I can't get on your Microsoft stuff.  
**Martha:** Okay,  
**Tayler Ramsay:** Thank you.  
**Martha:** let me do it.  
**Tayler Ramsay:** What' you say? I'm sorry. What' you say, Rob?  
**Rafael Alves:** No, I just mentioned that it's already like organized. is broken down into responsibilities, work environment,  
**Tayler Ramsay:** Yeah.  
**Rafael Alves:** habits, insights, quotes.  
**Tayler Ramsay:** Yep. I did a lot of work up front, but now we just need to do that for everyone.  
**Rafael Alves:** Yep. Got it.  
**Tayler Ramsay:** So there. That's good though. That's a perfect template. that we can set up for good. I'm glad  
**Rafael Alves:** I'm glad that you're glad about your own work.  
**Tayler Ramsay:** I'm glad that you understand it is what I mean.  
**Rafael Alves:** Oh, sorry.  
**Martha:** Um, I sent you by mail now.  
**Tayler Ramsay:** Okay. No, I just need like a file.  
 

### 00:36:48

**Tayler Ramsay:** Not  
**Martha:** Uh,  
**Tayler Ramsay:** out of  
**Martha:** okay. Sorry.  
**Tayler Ramsay:** I just Yeah, I can't get on your guys s\*\*\* point.  
**Martha:** I thought it was a file, but it's not. I'm so sorry.  
**Tayler Ramsay:** No,  
**Rafael Alves:** That  
**Tayler Ramsay:** you're  
**Rafael Alves:** was  
**Tayler Ramsay:** good. You're  
**Rafael Alves:** you just send the same thing  
**Martha:** Yeah,  
**Rafael Alves:** through here and through email.  
**Martha:** I think I did it as if I don't know.  
**Rafael Alves:** Okay. And when will this uh interviews start? like will we be particip  
**Tayler Ramsay:** That's all up to us. All that that's all up to the three of us. So,  
**Rafael Alves:** okay okay I thought you had like the schedule or something like that  
**Tayler Ramsay:** no, no, no. This is the initial like this is us three coming up with the plan to to do this so that within a few weeks I want to be able to give Bill real functional specs.  
**Rafael Alves:** Okay.  
**Tayler Ramsay:** Do you know what that means? What I mean by that, just like how how each user goes through the application, like you've seen them a ton of times.  
 

### 00:38:00

**Rafael Alves:** Yeah. Yeah. It's a document that combine spec like technical approaches and business business requirements kind of the same documentation, right?  
**Tayler Ramsay:** Agreed. Yes. Yeah. So, I think the three of us doing that together, we'll be able to nail it.  
**Rafael Alves:** Yeah, I agree.  
**Tayler Ramsay:** because I can make slides for any kind of visual thing we need to communicate better like things that aren't making sense all that. Here we go. Oh yeah, I forgot about this. Sometimes I do good work. Awesome. Yeah. So let's just use this as actually what I'll do is let me come up with an initial or actually how about you guys come up with an I'll give you guys the users like a salesperson a financial person like the type of person in the or you kind of build off of use this as a template to build their interview basic interviews. What do you think?  
**Martha:** Yeah, I think it could work.  
**Tayler Ramsay:** Or is that wasteful? I don't want to waste time on things that don't make sense.  
 

### 00:39:17

**Rafael Alves:** I think we can use that to guide. Yeah. Yeah. Of course. No, it's a good plan like the more generic more generic approach we can build based on this and yeah.  
**Tayler Ramsay:** So then what also I was hoping it will do is make you guys kind of ask questions to yourselves that might make you ask me questions. So like, so this is Amanda, right? Take it from the saleserson. All right. Now, what would a sales use this and then think of it from the feet of a salesperson come up with a generic questionnaire that might make you guys ask questions then is all because I'm going to do the same thing. Just so you know, I'll probably do the same thing just so I get my head around some ideas because that's how I'll get more ideas about, you know, even how they're going to use the app because obviously we don't even have an app for them to use. It's hard to figure out how they're going to use it.  
 

### 00:40:13

**Tayler Ramsay:** But I'm excited. I think this will give us a great foundation.  
**Rafael Alves:** Quick question. I remember you mentioning that this project was like secret a top secret project that you were working on. Uh are they aware that we're going to interview them about  
**Tayler Ramsay:** Oh  
**Rafael Alves:** this  
**Tayler Ramsay:** yeah. And  
**Rafael Alves:** project?  
**Tayler Ramsay:** don't Yeah. Don't worry about any of that stuff. Yeah. It's still a secret thing, but there's only a few people we're interviewing. I mean, there's like 60 people in  
**Rafael Alves:** Yeah.  
**Tayler Ramsay:** the  
**Rafael Alves:** No.  
**Tayler Ramsay:** now.  
**Rafael Alves:** Yeah, the  
**Tayler Ramsay:** Yeah.  
**Rafael Alves:** question is uh will the interview be a surprise or we're going to talk about what we're going to interview them about so they come  
**Tayler Ramsay:** Oh  
**Rafael Alves:** prepared?  
**Tayler Ramsay:** yeah. No, no surprises. It'll just be normal. Everything will be normal. They'll know  
**Rafael Alves:** Okay.  
**Tayler Ramsay:** that what we're doing, why they're doing it. So, we don't I just want to make sure we don't waste their time.  
 

### 00:41:01

**Tayler Ramsay:** So, that'll be that's what I want to be prepared for. like definitely want organic answers obviously, but I also want to go in as prepared as possible so that like we don't spend 15 minutes with me talking over myself being like this is what we're trying to do just so you know I just want to be more like streamlined, you know?  
**Rafael Alves:** Yeah. uh we can do like that for the first ones and see how the how we're going to have like their responses because I've done some interviews in the past where they were not like clear about why we were interviewing them about that process and then they were not like giving anything insightful  
**Tayler Ramsay:** Oh, they'll  
**Rafael Alves:** because  
**Tayler Ramsay:** know exactly what we're interviewing. That's They'll know everything.  
**Rafael Alves:** oh okay then I  
**Tayler Ramsay:** There's  
**Rafael Alves:** I  
**Tayler Ramsay:** no secrets. No, no, no, no. I I don't want to waste their time is what I meant. Like when I I guess I more meant like I want to go in there with some set questions and then fill in the rest like we said.  
 

### 00:42:06

**Tayler Ramsay:** Like I I I want it to be organic, but I just I also want it to be I want it to have um a formation to it. You know what I  
**Rafael Alves:** Yeah,  
**Tayler Ramsay:** mean?  
**Rafael Alves:** of course. We don't want to approach anything out of order because we could have like a bad result coming out for firming. Okay. So this the structure that you uh created for Amanda, this is how the interview went on or this is how you organize things that you guys talked about?  
**Tayler Ramsay:** Yes. Yeah. This is how I organize the notes that we talked about. So,  
**Rafael Alves:** Okay.  
**Tayler Ramsay:** what I'll do is the same thing. So, I just let the meeting notes go and then I use AI to transcribe everything. So, that's just how I do it and it works really well. So, I mean, I would just say do it. Obviously, I feed it a bunch of different frameworks so that it stays within guardrails, but it gets the results.  
 

### 00:43:07

**Tayler Ramsay:** So, the main thing is we ask the right questions. That's the most important thing. Synthesizing the data, I can handle that. It's about get I just we got to ask the right questions. That's the most important thing.  
**Rafael Alves:** agree.  
**Tayler Ramsay:** So,  
**Rafael Alves:** How long will be this interviews?  
**Tayler Ramsay:** let's try to keep them at like 15 minutes if we can. I don't want to like waste people's time.  
**Rafael Alves:** 15.  
**Martha:** Yeah.  
**Tayler Ramsay:** One five. Trust me, they're not gonna unless that Unless it's someone that maybe that should be longer, I will. But for the most part, they're not going to be that long.  
**Rafael Alves:** Okay. if  
**Tayler Ramsay:** Yeah.  
**Rafael Alves:** they don't have like very long process to present us  
**Martha:** Wow.  
**Rafael Alves:** because I don't know I just thought that it was 50 and now that that's why I confirmed it was 50 or 15.  
**Tayler Ramsay:** Yeah, just 15.  
**Rafael Alves:** Got it. Okay. Okay. Yeah. We need to come prepared then.  
 

### 00:44:04

**Rafael Alves:** Yeah.  
**Tayler Ramsay:** Yep, you get it. All right, brother and sister. I think that went good. I think that was a lot more  
**Rafael Alves:** Okay. So for the next steps, we need to look into this structure that you put together and then the structure that you uh created with CHP to have like an overview of all the roles that we're going to have within the application and then put together a set of questions that can that may be good for us to ask about each one of those roles.  
**Tayler Ramsay:** Right? And we don't have to ask them. Like if they don't come up, if it doesn't make sense, but it's  
**Rafael Alves:** Yep.  
**Tayler Ramsay:** good. The more we have up front, the better, right?  
**Rafael Alves:** Yep.  
**Tayler Ramsay:** Because it gets us asking more questions. So nothing is a bad question. Let's do the confluence thing real quick. Um, so all this is in one spot for everyone.  
**Rafael Alves:** So, we were going we're not going to have access to the page that you guys are already working on.  
 

### 00:45:10

**Rafael Alves:** We're  
**Tayler Ramsay:** I  
**Rafael Alves:** going  
**Tayler Ramsay:** know.  
**Rafael Alves:** you guys were going No, I'm just uh clarifying because you covered that a little but and then I remember you mentioning that you guys are going to move everything from one page to the page that we have access to.  
**Tayler Ramsay:** Yeah, I made a confluence page and I'm going to move it to the one that you guys have access to.  
**Rafael Alves:** Yep. Got it.  
**Tayler Ramsay:** So, and it's I guess it's a space, right? Is that what it is? Not a page. You have access to a whole space, I think.  
**Rafael Alves:** Not sure.  
**Tayler Ramsay:** Well, that didn't do anything. f\*\*\*. Oh, wait. Here we go.  
**Martha:** See  
**Tayler Ramsay:** Dude, I hate  
**Martha:** what  
**Tayler Ramsay:** security. This is so  
**Martha:** Actually,  
**Tayler Ramsay:** Do you know how to link things?  
**Martha:** I don't. Um, let me see if I can find out.  
**Tayler Ramsay:** Now I can figure it out. I just didn't know there was an easy way to do it.  
 

### 00:49:12

**Tayler Ramsay:** There. See if you can get to it now.  
**Martha:** Let me try.  
**Tayler Ramsay:** I have to publish it.  
**Martha:** Yeah, I can see it.  
**Tayler Ramsay:** You can the  
**Martha:** Yeah,  
**Tayler Ramsay:** whole thing.  
**Martha:** but  
**Tayler Ramsay:** That's  
**Martha:** I don't don't have access to the link. I have to request access. I can see the page, but I can't access the link you put on the page.  
**Tayler Ramsay:** Oh, then that doesn't help.  
**Martha:** Yeah,  
**Tayler Ramsay:** All right. Well, I'll have to copy and paste everything over. Just give  
**Martha:** maybe  
**Tayler Ramsay:** me a  
**Martha:** you can create a copy of the file and then move to the space.  
**Tayler Ramsay:** I I tried doing that. I tried moving it and it wouldn't see it. So,  
**Martha:** Yeah.  
**Tayler Ramsay:** unless you see it. Hold on. Do you see my screen?  
**Martha:** Yeah.  
**Tayler Ramsay:** Okay. So, I went in here and it said move,  
**Martha:** Yeah.  
**Tayler Ramsay:** but then it won't let me  
**Martha:** Yeah.  
**Tayler Ramsay:** select this.  
**Martha:** Uh it's only on an S, not you.  
 

### 00:50:50

**Martha:** But maybe you can't do it. Yeah.  
**Tayler Ramsay:** See, because I I'm trying to move it from one space to another as  
**Martha:** Yeah. It's not allowing it.  
**Tayler Ramsay:** let's see if there's a way. That's a good question. It might not work because of security either. Moving it to KISS. I don't know. We'll see. Yeah, I don't think it's going to work. There we go. So, now this one's in kiss. I want to move it to a different space. It won't let me.  
**Martha:** Yeah,  
**Tayler Ramsay:** You  
**Martha:** I  
**Tayler Ramsay:** can't.  
**Martha:** think here it's not possible.  
**Tayler Ramsay:** Yeah, I saw that, too. It's not letting me. It's because it's it's security. It's all right. I'll just All right.  
**Martha:** All right.  
**Tayler Ramsay:** Why isn't it letting me create a folder? That's weird. It's only letting me create pages, not folders. So like I can't create like an uh project folder.  
**Martha:** on on for space.  
 

### 00:55:24

**Tayler Ramsay:** Yeah. On the kiss I see like there's folders for Dell and HFD.  
**Martha:** So they uh when I created those I created like a page and  
**Tayler Ramsay:** Uh  
**Martha:** then I just uh move the page to a place under the title. So, it's like it goes like a drop-down menu, but it's not a a folder, I think, because I never created a folder.  
**Tayler Ramsay:** all right, let me try that. Oh yeah, there it goes. Got it. All right. So there there's s\*\*\*. All right. I think I got it. Well, it's weird because when you click on the folder, it opens the actual page. You can fix it if you want. If you want to have  
**Martha:** Yeah.  
**Tayler Ramsay:** like folder be blank, you can move project charter like rename. You know what I mean?  
**Martha:** Yeah.  
**Tayler Ramsay:** Okay, let's create a whiteboard. Isn't there a way to do whiteboards? Maybe not.  
**Martha:** Is this  
**Tayler Ramsay:** I  
**Martha:** s\*\*\*?  
 

### 00:57:34

**Tayler Ramsay:** think I can embed the fig. If I can get a whiteboard, I can embed that fig jam. All right, I think I got everything. Let's see. On boarding, project charter and then the road. Yep. So, there's two pages. And then I put in the Fig Jam link. And then what I want to do is take actually what you just sent me. I do with that. How's this look? Can you see Confluence on your end?  
**Rafael Alves:** We're seeing the notes documentation.  
**Tayler Ramsay:** No, I meant actually. Can you log into Confluence? Kiss Confluence and see the  
**Rafael Alves:** Oh, I thought  
**Tayler Ramsay:** everything.  
**Rafael Alves:** you were me on your screen. Sorry.  
**Tayler Ramsay:** No, you're good.  
**Rafael Alves:** You're on mute, Martha.  
**Martha:** I'm talking to myself, but I can see the page.  
**Tayler Ramsay:** Okay, good. Well, now I kind of want to fix this so it's got the right page. Okay. How do you do the header again?  
 

### 01:03:40

**Tayler Ramsay:** Damn it. Can't remember. There's a way you can do like a header. It's okay. Is this good though?  
**Martha:** Yeah.  
**Tayler Ramsay:** We're good to start. Let's do that. There we go. Now has a little picture on the cover. Sweet. All right. So then I guess you guys will just look at these and then just come up with interview questions. What I'm going to do is I will take the notes from the chatbt that we had and I'll put them in there as well. And I'll put the notes from today's meeting in here. Did that  
**Rafael Alves:** Sounds  
**Tayler Ramsay:** help? Yeah, sounds great. All right, guys. Um, do you just want to How long you guys want? Like next week get back together or next this week? What are you thinking?  
**Rafael Alves:** It's uh I think well we will assess the task during this afternoon and then we'll get back with an answer to you. Sounds good.  
**Tayler Ramsay:** Yeah, that's perfect. See you. Bye.  
 

### Transcription ended after 01:06:28

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