# Report for Yellevate

Group number 7 (Lucky 7)

## Date of submission

29 August 2022

## Link to reports

<https://drive.google.com/drive/folders/15jLa1ZS9_EWd_1Zi-UIf-6_jbko5_GYd>

## Members:

Eric Bonghanoy

Mavel Espenilla

Reynard Kevin Francisco

Rhemo Bacerra

Oyelle Anfernee Veloso

## Tasks

To come up with insights and actionable recommendations for the company to resolve the issue about revenue loss and client disputes.

1. Conduct team meetings
2. Determine each team member’s strengths and background.
3. Divide tasks among team members. All reports are subject for review from other teammates.
4. Arrive with insights that could lead into “actionable” recommendations.
5. Create a presentation that is designed for executives in a company.

## Plan

| **Task** | **Member Responsible** | **Target Date** | **Status** |
| --- | --- | --- | --- |
| Assignment of tasks | Eric | 27.Aug.2022 | Completed |
| Clean the data | Mavel | 13.Aug.2022 | Completed |
| Calculate the processing time in which invoices are settled. | Reynard | 13.Aug.2022 | Completed |
| Calculate the processing time for the company to settle disputes. | Rhemo | 13.Aug.2022 | Completed |
| Compute percentage of disputes received by the company that were lost | Oyelle | 13.Aug.2022 | Completed |
| Compute percentage of revenue lost from disputes. | Mavel | 13.Aug.2022 | Completed |
| Determine the country where the company reached the highest losses from lost disputes. | Reynard | 13.Aug.2022 | Completed |
| Computation for additional insights | Mavel | 13.Aug.2022 | Completed |
| Collate and summarize all insights thru Excel | Oyelle | 19.Aug.2022 | Completed |
| Create summary report in MSword / pdf | Rhemo | 26.Aug.2022 | Completed |
| Create presentation - powerpoint | Mavel | 26.Aug.2022 | Completed |
| Create presentation - video | Rhemo and Yelle | 27.Aug.2022 | Completed |

## 

## Notes

Prior to virtual meeting #1, a team leader was appointed and a discord group was created. Team members were briefed about the company’s current situation and were provided with relevant data.

### Virtual Meeting #1

**Date**: 10 August 2022

**Time**: 19:30H

**Platform** : Zoom application

**Attendees**:

* Eric Bonghanoy
* Mavel Espenilla
* Reynard Kevin Francisco
* Rhemo Bacerra
* Oyelle Anfernee Veloso

**Activities**:

* Ice-breaking activities to know each other as well as being familiar
* Brainstorming and recording of participants’ opinion that are relevant to the company’s current situation
* Construction of organizational structure

**Discussion**:

1. Appointment of assistant team lead
   * Reynard Kevin Francisco - appointed as assistant team lead
2. Discussion of result/output
   * The team arrived with the same answer except for the computation of the number of days for the company to settle disputes. The team intends to consult the mentors regarding the matter during the second consultation which is on August 15, 2022
3. Workspace : all team members can edit the work space
   * https://docs.google.com/document/d/1gAzSdGFfdNyYLj1U2mCmETHto2ZWzygTIhV23nakBZI/edit#
4. Date and time for second meeting
   * 3 August 2022
5. Outliers: is it needed?
   * Check for outliers in terms of the amount of invoice on the right side of the bell curve.
   * Check for outliers in terms of the days to settle invoice on the left side of the bell curve.
   * Factors that could lead into disputes - country of origin of clients and days to settle invoice
6. Visualization : what to plot
   * Create a dashboard
7. Assignment of tasks

**Record of zoom meeting:** https://discord.com/channels/1006170371336179743/1006170371336179746/1006937622783983707

### Virtual Meeting #2

**Date**: 13 August 2022

**Time**: 20:00H

**Platform** : Zoom application

**Attendees**:

* Eric Bonghanoy
* Rhemo Bacerra
* Oyelle Anfernee Veloso

**Activities**:

* Sharing of Data Visualization
* Discussion of findings, insights, and recommendations.
* Initial organization of the flow of discussion of the final report

**Discussion**:

* Findings and insights
  + On top of the results from sql, an interactive dashboard was created thru pivot tables and slicers for a better understanding of the problem. Team members came up with the same thought on how to present the data and that is through tables and charts. The clients will be dealt with as a whole and will just be grouped according to their country of origin and whether they are winning the dispute or not.
  + The things discussed during the meeting is still subject to change even though the team has agreed to most of the ideas.
* Possible recommendations
  + The team agreed on several recommendations that could be used to alleviate Yellevate’s problem regarding client disputes. Alternative mode of billing and revision of contract to limit maximum allowable disputes before the company will stop providing service to a client.

**Record of Zoom Meeting:**

https://discord.com/channels/1006170371336179743/1006170371336179746/1008045780319355050

### Virtual Meeting #3

**Date**: 15 August 2022

**Time**: 20:30H

**Platform** : Zoom application

**Attendees**:

* Eric Bonghanoy
* Mavel Espenilla
* Rhemo Bacerra
* Oyelle Anfernee Veloso

**Activities**:

* Sharing of additional insights c/o Ms Mavel
* Draft the flow of the story the team wants to tell

**Discussion**:

* 36 or 34?
  + The team is divided on how to deal with objective number 2 which is to answer the average time the company handled disputes. One team discussed that to address the question, only those clients who won in the dispute will be considered in the computation. On the other hand, the second group considered all clients who disputed whether they won or not. As the members present during the meeting are equally divided, the team just decided to move on with the other topic for discussion and will clarify with the mentors how to properly deal with this question.

Record of Zoom Meeting:

https://discord.com/channels/1006170371336179743/1006170371336179746/1008958994326491137

### Virtual Meeting #4

**Date**: 19 August 2022

**Time**: 19:30H

**Platform** : Zoom application

**Attendees**:

* Eric Bonghanoy
* Mavel Espenilla
* Reynard Kevin Francisco
* Rhemo Bacerra
* Oyelle Anfernee Veloso

**Activities**:

* Draft reports for submission

Discussion:

1. One of the team members introduced the idea about Pareto Analysis. The team discussed whether implementing this technique will make a big impact on the analysis of data as the technique will only focus on the clients who possibly generated 80% of the company’s problem. The team highly considered the idea that instead of considering all the clients, the team will just take a small sample and will be used to represent the whole population.
2. When computing for the average time the company settles disputes, all clients who disputed whether they won or lost will be included.

**Record of Zoom Meeting:**

https://discord.com/channels/1006170371336179743/1006170371336179746/1010339117864849518

### Virtual Meeting #5

**Date**: 23 August 2022

**Time**: 19:30H

**Platform** : Zoom application

**Attendees**:

* Eric Bonghanoy
* Mavel Espenilla
* Rhemo Bacerra
* Oyelle Anfernee Veloso

**Activities**:

* Finalize the reports for submission
* Selection on who will do the video presentation

**Discussion**:

1. The team member who was assigned to a particular task shared her/his screen and all the team members present provided comments and suggestions. As the length of the video presentation is limited to 7 minutes, the number of slides was reduced and the information to be presented was carefully selected. The main business objective was highly given priority as answering those questions is part of the criteria. The team also decided a theme for the presentation in terms of color to be used in the powerpoint.
2. It was deliberated that Yelle and Rhemo will do the video presentation. Yelle will do the first half of the presentation while Rhemo will do the second half.

Record of Zoom Meeting:

https://discord.com/channels/1006170371336179743/1006170371336179746/1011810336317390848

### Virtual Meeting #6

**Date**: 26 August 2022

**Time**: 19:30H

**Platform** : Zoom application

**Attendees**:

* Eric Bonghanoy
* Mavel Espenilla
* Rhemo Bacerra
* Oyelle Anfernee Veloso
* Reynard Kevin Francisco

**Activities**:

* Practice the video presentation
* Recording of video presentation