**Week of Jan 11th- Jan 22nd**

**Blog 1: January 23nd, 2019**

In the initial two weeks we began by setting up a common meeting time according to everyone’s schedule in addition to the class time provided to us. I think getting the coordination between our schedules right at the beginning proved to be helpful to set the momentum and routine going for us. We created a Google drive through which we can effectively track our progress and review each other’s work.

I am the communications lead for my team. I sent out an initial welcome and an e-intro from all of us to our point of contact at Credit Suisse to set up a time for our kick-off meeting. I believe, I was proactive and sent out the email well in advance so that we could match our timings and had a margin for any changes. I got a prompt reply and helped in setting up e-invites by sharing all the necessary contact information of my teammates. I think I did a good job by striking a balance between communication with my client and my teammates so that we don’t lag behind in our preparation and were well aware about all email exchanges.

In our first meeting, I researched a lot deeper into the company, its divisions, solutions and practices to create a broad canvas in order to drill down to the problem effectively. In addition to that, I did research on the technology landscape specific for Credit Suisse i.e the financial technology (also popularly known as FinTech). I made a brief summary and shared relevant articles from Credit Suisse’s website about the same with my group. We got an industry view on the types of technologies present in this space. Moreover, I familiarized myself with how the sales pipeline works as that is the core of our problem statement. After discussing the points from our respective research, we made a list of comprehensive questions that we would like to ask the client in our first call.

Our first client kick-off call happened on January 18th. They gave us a detailed view on the problem statement, their divisions and functioning. They described their CRM system and the kind of data we might be getting and an overview of their pipeline process. They are currently working on our onboarding process to give us access to the data and additional tools that we would require and also a demo of their system. After our kick-off call, we updated our Google Doc from all the information we got from each of the participants. After our client call, we also had a Skype session with Chris, our mentor for the project. They highlighted that our key goal should be to assess the probabilities assigned by them for each of the stages in the pipeline. I will be spending more time to research all the materials on CRM, Sales Funnel and the pipeline model so that I have a clearer view of the process.

We are currently waiting and looking forward to get the data so that we can start work on preprocessing, data exploration and updating our domain knowledge too. All of our future meetings would be on call. The internal access provided by them would allow them to see our progress as well.