**Week of January 24-February 9th**

**Blog 2: February 9th, 2019**

In these weeks, we progressed with respect to our access and onboarding with our client and got an opportunity to familiarize ourselves with the initial data description before we are able to get full access. On January 28th, we had a call with Mariem Ayadi (our point of contact for all calls). In this one-hour call, we were provided with a snapshot of publicly available resources to give us a relatively detailed view of our project, how the CRM system looks like (screenshot of Microsoft Dynamics), Credit Suisse’s Asset Management division and what we should be expecting in terms of our data and solution approach as our onboarding was still in process. Following this call, we decided upon a few timeslots for our weekly review calls. I sent our availabilities and coordinated with Mariem to set up our weekly call for Fridays 12pm-1pm. The last placeholder for our weekly review meetings is for May 1st.

I proactively followed up with respect to our onboarding process, and if there is anything we could assist them with. In the meantime, we studied the sales pipeline system through various resources and reports so we could get a head start on the kind of questions we would like to pursue when we finally looked at our data. We also looked into Kaggle competitions to get an understanding of different approaches we could do. I spent time through various videos and articles so that there is familiarity when I would see the data. We also streamlined our potential sprints, divided into three milestones on Trello, and shared our dashboard with the professors.

Our onboarding process progressed and we were given NDAs to sign with a few other details. I provided with all the necessary details promptly and organized with getting the Non-Disclosure agreements signed and sent them out the next day. We all received our respective login information and steps to follow. We were very proactive and started early on so that it doesn’t hamper our upcoming weekly call. We were having some trouble with synching into the system, however, with great support from the Credit Suisse team, we were able to successfully log-into our virtual machines. I actively conveyed and updated our client with the technical difficulties we were facing at first, and with support from them, we got on a call with their IT specialist who helped and resolved each individual’s problem. We were all logged in and our access was complete. I was constantly in touch with Mariem regarding our upcoming weekly call to get to know the contents of the call so that we are prepared and kept updating her on each of our virtual machine statuses, and what applications we currently have in our system. In our weekly call on February 8th, we were given access to our data. We spent considerable time post that, to properly evaluate the data, see the fields, get an early assessment of it and started brainstorming on the kinds of questions we would like to begin with and start solving for. Looking at the data, we all created a list of questions, our variables of interest and how we would like to pursue our initial data exploratory analysis.

We also created a two-pager first draft covering our problem statement, our solution methodology and time-line and submitted it for approval. After getting feedback, we rectified and elaborated our solution methodology. In the coming weeks, we aim to catch up with our data cleaning and pre-processing and prioritizing our list of questions.