**Blog 1: January 22nd, 2019 (Week of Jan 11th- Jan 21st)**

After the team being set up, we firstly introduced ourselves and assigned different responsibility to the different members according to our willing and ability. I am the technic support since I am good at statistics. We also set up a regular group meeting time apart from the class time when we can solve problems and plan for the following week. Our regular meeting time is 4:30 p.m. – 5:30 p.m., Monday. To better communicate and work, a Google drive folder and a WhatsApp group were created.

We had only 3 days to prepare for the first presentation in class. Although it was only a brief introduction to the company and the problem, we put much effort into the preparation. We decided to divided our presentation into 3 parts: introduction to Credit Suisse, the technology landscape related to Credit Suisse and the problem statement. I selected two pictures which can represent the current divisions and business of the Credit Suisse from its official website and pasted them into the first slide. I also wrote some supplementary material to help my teammates to better understand the pictures. We also had a grasp of the financial technologies Credit Suisse is now using in the business. The hardest part was to understand the problem correctly. Initially, most of our team members had a difficulty in understanding the CRM system and pipeline opportunity. With no clues except the keyword “pipeline”, I dug into the issue and got a view on the relationship between the CRM system and sales pipeline, the process of sales pipeline and other core concepts of our problem. I shared some relevant links with my teammates to avoid misunderstanding among the group. I believe I did a good job by helping team members figure out the core concepts and motivating them to keep working on the capstone.

According to the feedback to our presentation, we made a list of questions we would like know from our clients. Our communication lead is proactive to reach out to the clients and our first kick-off meeting with clients was on January 18th. The Credit Suisse CSAM team members clarified their needs and helped us get a deeper understanding of the problem. The detailed description of the CRM system and the data we might be working indicated the direction of our further work. We also had phone call with our mentor of this project after the kick-off meeting. He strengthened the objective of our project and suggested us to dig into the CRM system. And we updated these valuable information in the Google Doc.

I am now looking into a Kaggle competition related to the CRM system while waiting for the data. We will have regular meetings with our clients to show them our process.