

Background and Objective

Understanding the Problem: Discuss the main goal, focusing on the issues with the current management information system, specifically the challenges with unstructured and scattered data.

Scope of Work

Requirements and Expectations: Determine the exact requirements, including the analyses needed, data to be analyzed, expected reports, and how the data should be structured.

Deliverables

Expected Outputs: Clarify the specific deliverables, including the number and type of reports, any development in Power Apps, and documentation or designs provided.

Feasibility

Project Realism: Assess whether the project can realistically be completed within the given timeline and resources, considering the team's constraints.

Key Questions for the Meeting

Background Understanding

Current System Pain Points: What are the specific challenges you're facing with your data and management information system?

Deliverables and Expectations

Detailed Deliverables: Can you specify the types of reports and analyses you expect from this project? Are you looking for a design, prototype, or both?

Scope Clarification

Analyses and Data: What specific data analyses are required, and how do you envision these supporting your decision-making process?

Technical Requirements

Platform and Integration: Do you anticipate any development in Power Apps or other platforms? How do you see the integration of structured data with your system?

Project Feasibility

Prioritization and Scaling: Given our resources (80 hours a week for 13 weeks), what are your priorities, and are there project aspects that could be scaled down?

Off-Scope Items

Beyond Scope: Identify any requests that are beyond the project's scope, given time and resource constraints.

Conclusion

Summarization and Next Steps: Conclude with a summary of key points and outline the immediate actions required from both parties.

Additional Considerations

Data-Related Inquiries

Data Understanding: What is the nature of the data (storage, structure, volume)? Is there a data dictionary available?

Market and Industry Insights

Industry Relevance: Discuss the demand for data analytics versus advanced AI solutions in the industry and job market trends.

Team Coordination and Communication

Roles and Responsibilities: How will tasks be assigned, and how will continuous communication be ensured within the team and with the client?

Project Planning and Documentation

Planning: Emphasize the importance of a detailed project plan and the process for sharing and reviewing it with stakeholders.

Client Communication and Approval Process

Feedback and Sign-off: Outline the process for obtaining client feedback and the importance of managing timelines for review and approval.

Presentation Preparation

Preparation for Presentation: Provide guidance on preparing for the presentation, emphasizing documentation and understanding of the requirements.

Submission and Sign-off Procedures

Submission Process: Discuss the submission process, including the need for client sign-off and advice on avoiding last-minute submissions.