Client Interaction Report

Team: 1

Project name: DIAMOND

Meeting date: 9/11/2020 from 3-4pm PST

Meeting Participants: Dr. Darin Gray (client), Haiwen Chen, Samantha Cote, Danny Diaz Ayon, Shijie Ding, Meghana Kolasani, Dzung Phan, Derek Wang, Andrew Webb

1. Project Overview
   a. Current problems
      ● No integrity in data forms and formats
      ● Lack of a centralized data collection system
      ● Difficulties in extracting information from data collections
      ● Cannot perform analysis on data because it is distributed across multiple formats and platforms
      ● Data has been lost from spreadsheets
   b. Main stakeholders
      i. Key decision makers
         ● People receiving data reports from the STEM Center
         ● STEM Center staff members and student workers
         ● Program Managers of projects within the Center
         ● Students and teachers participating in the program
         ● Program funders and donors
         ● Viterbi administrators
      ii. Domain experts
         ● Program Managers of projects within the Center
      iii. Maintainer(s) / operator(s)
         ● 8 staff members will be inputting data
         ● 40 student workers will be inputting data
         ● A maintainer who has experience with Salesforce will be hired after the project is completed to maintain the system.
      iv. Target users
         1. Characteristics (age, occupation, lifestyle, etc)
            ● STEM Center staff and student workers who input data
            ● STEM Center staff and Program Managers who generate analytics and program evaluations from the data
   c. Current workflow (if applicable)
• Staff members and student workers manually collect and input data in various forms
• If there is a request on related statistics or analytics, they have to directly go through every source and manually extract just the data they need
d. Potential quantitative benefits
  • Save time and human resources
  • Reduce time spent collecting data for analysis
  • Reduce time spent on data entry
  • Increase the speed with which data analytics reports can be generated
e. Potential qualitative benefits
  • Avoid the risk of data loss
  • Improve maintenance and support ability
  • Increase in ease of use for staff members and students

2. Technical Overview
a. Current technologies used / considered
  • Salesforce
b. Current status of the system development
  • Development of the system has not started yet.
c. System dependencies
  • MS Access, MS Excel, MS Word
  • Google Forms, Google Sheets
  • Qualtrics Surveys
d. Similar product(s)
  • N/A
e. Key features / capabilities
  • Centralized system for storing and organizing data from demographics and program evaluations
  • Simple user interface
  • Automatic data scanning with OCR
  • Ability to manually enter data into pre-formatted fields
  • Migration and integration of existing data to new system
  • Ability to perform multiple data queries when requested
  • Formatted entry capability for all historical data

3. Key terminologies
  • N/A

4. Action Items
  • Meet on Wednesday, September 16th from 8-9pm PST for the initial stage of Win-Win Negotiation
- Get team website up and running
- Creation of team Trello board