

1. Relationship Report

Create the following:

**Edgelist**

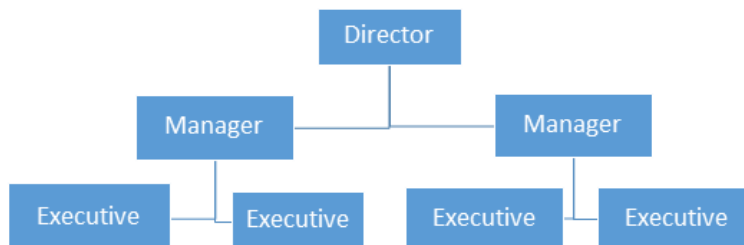
Source	Target	Weight (frequency of emails)

**Nodelist**

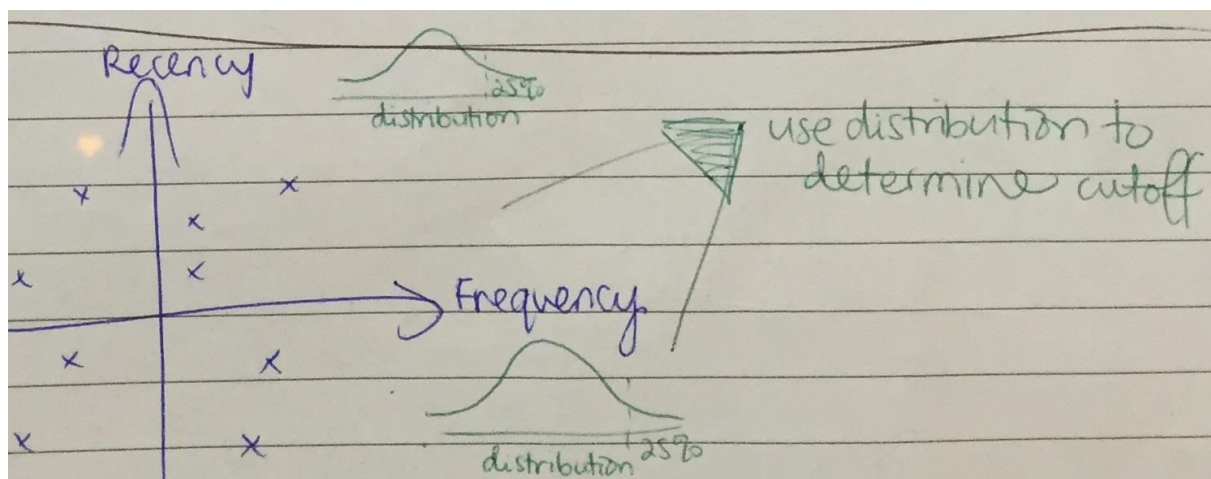
Employee ID	Type
	Client
	TrustSphere
	Client
	Partner

Internal vs. External Network

- Use staff list to determine hierarchy of nodes (sales manager, director etc.)



- Use staff list to determine which teams/departments nodes belong in
- Examine collaboration across hierarchy and teams

2. Relationship Score

For internal relationships

- Recency
- Frequency

For external relationships

- Recency
- Frequency
- What stage of sales cycle did employee reach with the client? i.e. stronger relationship with a client in POC stage than in Prospecting stage

How to decide reference points? i.e. what is considered recent/frequent?

- Examine distributions of recency and frequency, take the mean as basis of comparison or
- Allow interactive point of reference
- Let user set point of reference e.g. client can set any communication within last 5 days to be considered recent

### 3. Assessing Hot/Cold and Strong/Weak Relationships

What is the base of the relationships?

- Only considering internal?
- No. of relationships should be equal to no. of external

### 4. Determining Stages of Sales Cycle Based on Email

Employee ID	Stage				Total	Sales To-Date	Sales Quota Forecast
	Prospecting	Meeting	POC	Post-POC			

### 5. Produce draft visualizations by next meeting (27 Oct Thursday)