

**AP Meeting with TrustSphere (25 Aug)  
with Ridwan Ismeer, Product Team**

Clarification of Scope of Work

10:00 - 10:15

1. Do not focus on network visualizations as TrustSphere is already working on that
2. **Option #1 Sales Dashboard** - What would a Sales Director want to see?
  - a. What is the salesperson up to?
    - i. Interaction with various departments e.g. marketing
  - b. How many emails has a salesperson sent? Replied to?
  - c. What are the overlap of relationships?
    - i. Do Salesperson A and B interact with the same colleagues/customers?
  - d. What are the quality of the relationships?
    - i. Develop our own measure
    - ii. Recency, frequency, TrustScore etc.
  - e. Discover opportunities through sales people's emails and placing them into an appropriate sales cycle
    - i. Requires text analytics on email subject lines
    - ii. E.g. For Salesperson A, 50% of emails about closing, 20% about meetings etc.
  - f. Sector interactions
    - i. What sectors do particular salespeople tend to work with?
    - ii. Low priority
  - g. Dependency
    - i. How many % of the firm's business depends on a certain salesperson/a few salespeople?
    - ii. Low priority
  - h. Influencer & Collaborator Scores
    - i. Clustering coefficient on R?
    - ii. Low priority - maybe only if there is time at end of project
  - i. Network trajectory
    - i. How a salesperson's network develops as time passes
    - ii. How the salesperson moves across the network as time passes
    - iii. Would need more data across time?
    - iv. Low priority
  - j. Alert System
    - i. If no time, at least make it easy for user to immediately spot problem areas on dashboard
    - ii. Size, colour etc.
    - iii. Could pass project along to IS480 FYP students
3. **Option #2 Salesperson Dashboard** - What would the salesperson want to see?
  - a. Consolidated view of who he is been talking to
  - b. Unreplied emails
  - c. Who else is talking to who he is talking to?
  - d. Consolidation of business card information
    - i. Matching names to email correspondences
  - e. Like an efficiency tool
4. Decision
  - a. Focus on Sales Dashboard for Sales Director/Manager
  - b. More opportunity for analysis than Salesperson Dashboard, which leans towards being an efficiency tool

5. What platform will the dashboard be on?
  - a. For group to think about

Data Clarification

10:30 - 10:45

1. Data received only includes salespeople's correspondences and networks
2. Salespeople (and data) come from TrustSphere's global offices
  - a. Local salespeople could contact international clients
  - b. Affects analysis for overlap of relationships
3. Will be provided with internal and external network
  - a. Group to research on size, meetings, poc
  - b. Identifiers for performance, strong or hot relationships etc.
4. Requesting for data from May onwards

Future Meetings

10:45 - 1050

1. Weekly meetings with TrustSphere
  - a. 1 Sep (Thu) 10am
  - b. Subsequently Tuesdays 2.30pm (online/at TrustSphere office)