

TEAM R&I

Client Meeting Agenda

Meeting/Project Name:	2018T2 R&I		
Date of Meeting (DD/MM/YYYY):	01/03/2019	Time:	17:30 – 19:00
Meeting Facilitator:	Liting	Location:	SIS GSR 3-4

1. Meeting Objective

1. Doubts with the upcoming modules
2. Merge of Scope (Stock Management and Wealth Portfolio)
3. UAT before Mid Term

2. Attendees

Name	Attendance	Remarks
Chow Li Ting	Present	-
Teng Shu Yan Rachel	Absent	Intern Interview
Thevakumaren S/O Morgaya	Present	-
Raghavendar Gowri Sankar	Present	-
Mok Hao Ze Benjamin	Present	-
T S Kautham	Present	-

3. Pre-work/Preparation (Documents/Handout to bring, reading materials, etc)

Description	Prepared By:
-	-

4. Agenda and Notes, Decision, Issues	
Topic	Owner
<p><u>Doubts with the upcoming modules</u></p> <ul style="list-style-type: none"> - Marketing Promotion Module Make a single call <ul style="list-style-type: none"> o Customer Preferences <ul style="list-style-type: none"> ▪ For example, user choose sports as their preferences, once there is new promotional new (related to sports) it will send in the msg. o Notification Trigger <ul style="list-style-type: none"> ▪ Balance below 10k, Daily Limit and etc - Edit for Bill Payment or Fund Transfer <ul style="list-style-type: none"> o Set it as false and it will only cater to weekly or monthly o Only cares about the future date - Gamification Module <ul style="list-style-type: none"> o Include Group ID = gamification activated o Place emphasis on DCD o Leadership board <ul style="list-style-type: none"> ▪ Top 10th Group ▪ Top 10th Individuals o Refer to updated KYC o Questions should be populated from admin app 	Liting

5. Action Item		
Action	Owner	Due Date
DCD Theory (Step by Step Theory)	Rachel	12 th March 2019

6. Next Meeting (if applicable)	
Date (DD/MM/YYYY):	15/03/2019
Time	1700 - 1800
Location	SIS GSR 2-3
Objective	Weekly Update