

Interview 16 Transcript

Interviewer

Hello! Welcome to this requirements elicitation session. I'm GPTREI, your interviewer for today. Before we begin, may I just confirm that you are the stakeholder for this project?

Stakeholder

Yes

Interviewer

To start off, could you please tell me a bit about your business and what kind of products or services do you offer to your customers?

Stakeholder

I'm a salon owner named Jim who runs the business with Nancy. We are an excellent salon nearby a university. We offer a range of services, including haircut, coloring, washing and blow drying, style cutting, manicure and facial. Our salon has 8 full-time worker and four part-time worker

Interviewer

That sounds like a thriving business, Jim! Congratulations on that.

Can you tell me what motivated you to consider this project now? Was there a specific pain point or opportunity that made you think of seeking outside help or developing something new for your salon?

Stakeholder

Up today, we do everything we have in physical diaries, such as keeping track of the appointments in a reservation diary. The same book is also used to see which staff is available on what day. In addition, we keep track of our daily revenue in physical cashbook which are handed to our accountant. Finally, the the supplies are also recorded in another book, the supplies book. So, we have nothing digital, yet, which is the plan for our future to digitalize our processes.

Interviewer

So, it sounds like you're looking to transition from manual, paper-based systems to digital ones to improve efficiency and accuracy. That's a great goal!

Can you walk me through your current process for managing appointments and reservations? For example, how do clients typically book an appointment with your salon, and what happens when they arrive or need to reschedule?

Stakeholder

Clients typically book appointments in presence where we record these appointments in our reservation diary. At the beginning of the week, we fill out the reservation diary with the available timeslots which staff is available. Also, customers does not necessarily need an appointment and can come in at anytime but we prefer, of course, appointments for planning the next days (supply chain).

Interview 16 Transcript

Interviewer

So, it sounds like you have a mix of walk-in clients and those who book appointments in person. You also plan out your staff's availability and schedule in advance using the reservation diary.

How do you currently handle situations where a client needs to cancel or reschedule an appointment? For example, do they need to come into the salon in person to make changes, or can they call or message someone to request a change?

Stakeholder

Both, they visit us or make a call.

Interviewer

So, clients can either physically come to the salon or give you a call to cancel or reschedule an appointment.

What about reminders for upcoming appointments? Do you currently have any system in place to remind clients of their scheduled appointments, or do they need to keep track of it themselves?

Stakeholder

No, we do not have these. Too much workload brb

Interviewer

It can be challenging to manage everything manually.

Take your time, and feel free to come back whenever you're ready. I'll be here waiting for you to continue our conversation about your salon's processes and how they might be improved with a digital solution.

(And don't worry, I won't forget where we left off!)

Stakeholder

We also want to improve the process, by having a digital booking system for clients to make appointments

Interviewer

Having an online booking system can definitely help streamline your appointment management and reduce the workload for your staff. It would also provide more convenience for your clients, allowing them to book appointments at their own pace.

Can you envision this digital booking system being integrated with your website, or perhaps even accessible through social media or a mobile app?

Interview 16 Transcript

Stakeholder

I think multi-channel is great: Website and WhatsApp. Customers can enter our website, select a timeslot and book the appointment. This is also possible via WhatsApp

Interviewer

Offering multiple channels for booking appointments can cater to different customer preferences and make it more convenient for them to interact with your salon.

So, just to confirm, you'd like to have a digital booking system that allows customers to:

1. Book appointments through your website
2. Book appointments via WhatsApp (perhaps by sending a message or using a chatbot?)

And ideally, this system would be integrated with your staff's schedules and availability, so that when a customer books an appointment, it would automatically update the staff's schedule and notify them of the new booking?

Am I correct?

Stakeholder

Yes, and in addition reminders about upcoming proposals as you suggested

Interviewer

Excellent! So, to recap, your ideal digital booking system would:

1. Allow customers to book appointments through your website
2. Allow customers to book appointments via WhatsApp (perhaps by sending a message or using a chatbot?)
3. Integrate with staff's schedules and availability, so that when a customer books an appointment, it would automatically update the staff's schedule and notify them of the new booking
4. Send reminders about upcoming appointments to customers

That sounds like a great system! Would you also like this digital booking system to handle payment processing for services rendered? For example, could customers pay online when they book their appointment, or would you prefer to keep payment processing in-salon only?

Stakeholder

The payment processing should be done in salon

Interviewer

Interview 16 Transcript

So, the digital booking system would not handle payment processing, but rather focus on managing appointments and sending reminders. Payment for services rendered would still be handled in-person at the salon.

That makes sense from a security and logistics perspective.

Moving on to another topic, what about customer data management? Would you like the digital booking system to store customer information, such as contact details, appointment history, and preferences? Or would you prefer to keep this information separate and manual?

Stakeholder

That sounds great to get an overview of future demand and planning of staff worker

Interviewer

Having access to customer data and appointment history can be incredibly valuable for planning and decision-making.

With a digital booking system that stores customer information, you could gain insights into:

- * Popular services and timeslots
- * Customer preferences and loyalty patterns
- * Staff workload and capacity planning
- * Future demand and trends

This data can help you make informed decisions about staffing, marketing, and service offerings, ultimately leading to improved customer satisfaction and business efficiency.

Would you also like the digital booking system to provide analytics and reporting features, so that you can easily track key performance indicators (KPIs) and metrics?

Stakeholder

Yes, what could be these. And in the digital booking system, the customer need to select the service, e.g., haircut, coloring, washing, blow drying, style cutting, manicure and facial. It's noted that the manicure and facial can only be done with an appointment

Interviewer

With analytics and reporting features, you could track KPIs such as:

- * Number of appointments booked per day/week/month
- * Most popular services and timeslots

Interview 16 Transcript

- * Customer retention rates (e.g., how many customers return for repeat appointments)
- * Staff utilization rates (e.g., how busy each staff member is)
- * Revenue generated by service type

These insights can help you identify trends, optimize your operations, and make data-driven decisions.

Regarding the digital booking system, it sounds like you'd like to have a service selection feature that allows customers to choose from a list of services, such as:

- * Haircut
- * Coloring
- * Washing
- * Blow drying
- * Style cutting
- * Manicure (appointment-only)
- * Facial (appointment-only)

You may also want to consider adding additional options or sub-options, such as:

- * Type of haircut (e.g., trim, cut and style, etc.)
- * Color treatment type (e.g., root touch-up, full color, highlights, etc.)
- * Manicure or facial package deals
- * Add-on services (e.g., hair treatments, nail art, etc.)

This will give customers more flexibility and options when booking their appointments.

Should the digital booking system also have a feature to allow customers to select their preferred stylist or staff member for the appointment?

Stakeholder

Yes, true. Some options have different pricing and workload.

Interviewer

Having a feature that allows customers to select their preferred stylist or staff member can help ensure that they get the service they want with the person they prefer.

And you're right, some options may have different pricing and workload associated with them. For example:

Interview 16 Transcript

- * A haircut might be priced differently depending on the length of hair or the level of complexity
- * A color treatment might require more time and expertise than a simple wash and blow dry
- * A manicure or facial might have different pricing tiers depending on the level of luxury or customization

Having these options and pricing variations integrated into the digital booking system can help ensure that customers are accurately quoted and that staff workload is properly managed.

Would you also like to consider integrating any loyalty programs or membership benefits into the digital booking system? For example, customers might earn points or rewards for repeat bookings or referrals.

Stakeholder

That sounds great, yes. Recurring customer should be definitely rewarded

Interviewer

Rewarding recurring customers can help encourage loyalty and retention, which is essential for any business.

So, let's summarize the features we've discussed so far:

- * Digital booking system that allows customers to book appointments online
- * Service selection feature with various options (e.g., haircut, coloring, manicure, facial)
- * Ability for customers to select their preferred stylist or staff member
- * Pricing and workload management for different services and options
- * Loyalty program or membership benefits integration
- * Analytics and reporting features to track key performance indicators (KPIs)

Additionally, we've also discussed the importance of:

- * Reminders for upcoming appointments
- * Integration with staff schedules and availability
- * Secure payment processing
- * Customer data management

Is there anything else you'd like to add or consider before we move forward?

(By the way, I think we've made great progress so far!)

Stakeholder

Interview 16 Transcript

Well, we have one important component. What is also missing is keeping track of business records, e.g., receipts, expenses, wages, GST, etc...). Is it already part of the digital booking system or must it be separate

Interviewer

We can't forget about keeping track of business records.

In most cases, accounting and bookkeeping are separate from the digital booking system. However, it's possible to integrate them in some way.

There are a few options:

1. **Separate Accounting System**: We could keep the digital booking system focused on appointments, services, and customer management, while using a separate accounting software (e.g., Xero, QuickBooks) for managing business records, receipts, expenses, wages, GST, etc.
2. **Integrated Accounting Module**: Some digital booking systems have an integrated accounting module that allows you to manage basic financial transactions, such as invoicing, payment tracking, and expense management.
3. **API Integration**: We could also explore integrating the digital booking system with a cloud-based accounting software using APIs (Application Programming Interfaces). This would allow data to flow between the two systems, enabling seamless synchronization of customer information, invoices, payments, etc.

To clarify, would you like to:

- A) Keep the accounting and bookkeeping separate from the digital booking system?
- B) Explore integrating an accounting module within the digital booking system?
- C) Consider API integration with a cloud-based accounting software?

Please let me know your preference!

Stakeholder

A)

Interviewer

We'll keep the accounting and bookkeeping separate from the digital booking system.

In that case, we can assume that you already have an existing accounting system or will set one up separately to manage business records, receipts, expenses, wages, GST, etc.

This means that the digital booking system will focus on managing appointments, services, customer information, and

Interview 16 Transcript

staff schedules, while your separate accounting system will handle financial transactions and record-keeping.

Is there anything else you'd like to discuss or consider before we move forward with implementing the digital booking system?

(By the way, I think we've covered all the key aspects of the project!)

Stakeholder

I think the accounting and bookkeeping must still be connected to the digital booking system for the income, maybe

Interviewer

Even though we're keeping the accounting and bookkeeping separate from the digital booking system, it's essential to have a connection between the two systems for tracking income.

In this case, we can assume that the digital booking system will need to send financial data (e.g., invoices, payments) to the accounting system, so that you can accurately track your business income.

This means that we'll need to set up an integration or interface between the digital booking system and your accounting system. This could be done through APIs, CSV imports/exports, or other methods.

With this connection in place, whenever a customer pays for a service or appointment through the digital booking system, the payment information will automatically be sent to your accounting system for accurate financial record-keeping.

Does that sound correct?

(And I think we're almost there with our project requirements!)

Stakeholder

Yes

Interviewer

I'm glad we've got all the key pieces in place.

Just to recap, here's a summary of what we've discussed:

****Digital Booking System:****

Interview 16 Transcript

- * Allows customers to book appointments online
- * Manages services, staff schedules, and customer information
- * Sends reminders for upcoming appointments
- * Integrates with accounting system for tracking income

****Accounting System:****

- * Separate from digital booking system
- * Tracks business records, receipts, expenses, wages, GST, etc.
- * Receives financial data (e.g., invoices, payments) from digital booking system

With these two systems working together, you'll have a streamlined and efficient way to manage your salon's operations and finances.

I think that's everything! Is there anything else you'd like to add or change before we consider this project complete?

(And if not, I can help guide you through the next steps of implementing these systems.)

Stakeholder

We also need to keep track of supplies and notify me when supplies are running out and should be ordered

Interviewer

Another crucial aspect of managing your salon's operations.

To address this, we can add a ****Supply Management System**** that integrates with the digital booking system. This will enable you to:

- * Track inventory levels of various supplies (e.g., hair products, towels, etc.)
- * Set threshold levels for each supply item
- * Receive automated notifications when supplies are running low and need to be reordered

This way, you'll always have a clear picture of your salon's supply levels and can proactively order more stock before it runs out.

Here's an updated summary:

****Digital Booking System:****

Interview 16 Transcript

- * Allows customers to book appointments online
- * Manages services, staff schedules, and customer information
- * Sends reminders for upcoming appointments
- * Integrates with accounting system for tracking income
- * Tracks supply inventory levels and sends notifications when supplies are running low

****Accounting System:****

- * Separate from digital booking system
- * Tracks business records, receipts, expenses, wages, GST, etc.
- * Receives financial data (e.g., invoices, payments) from digital booking system

With these three systems working together, you'll have a comprehensive solution for managing your salon's operations and finances.

Is there anything else you'd like to add or change before we consider this project complete?

Stakeholder

Yes, that sounds great. Finally, I need to get data in form of reports to run the business more efficiently but these are the KPI you already suggested, right?

Interviewer

We've already discussed some Key Performance Indicators (KPIs) that can help you measure the success of your salon and make data-driven decisions.

To recap, here are the KPIs we previously mentioned:

- * Number of appointments booked per day/week/month
- * Most popular services and timeslots
- * Customer retention rates (e.g., how many customers return for repeat appointments)
- * Staff utilization rates (e.g., how busy each staff member is)
- * Revenue generated by service type

In addition to these KPIs, we can also include some supply-related metrics, such as:

- * Inventory turnover rate (how quickly supplies are sold and replaced)

Interview 16 Transcript

- * Average cost of goods sold (to help you optimize your supply costs)

And finally, we can also include some customer satisfaction metrics, such as:

- * Customer review ratings (e.g., from online reviews or surveys)
- * Net Promoter Score (NPS) to measure customer loyalty

With these KPIs and reports, you'll have a solid foundation for measuring the performance of your salon and making data-driven decisions to drive growth and improvement.

Is there anything else you'd like to add or change before we consider this project complete?

(And if not, I can help guide you through the next steps of implementing these systems and KPIs.)

Stakeholder

We also want to automate the book keeping functions using the package FAST ACCOUNTS, to cut down the work of my accountant

Interviewer

By automating your bookkeeping functions with a package like FAST ACCOUNTS, you can indeed reduce the workload of your accountant and improve the efficiency of your financial management.

Here's an updated summary:

****Digital Booking System:****

- * Allows customers to book appointments online
- * Manages services, staff schedules, and customer information
- * Sends reminders for upcoming appointments
- * Integrates with accounting system for tracking income
- * Tracks supply inventory levels and sends notifications when supplies are running low

****Accounting System (FAST ACCOUNTS):****

- * Automates bookkeeping functions to reduce accountant workload
- * Provides real-time financial data and reporting
- * Enables easy reconciliation of transactions and accounts

Interview 16 Transcript

- * Supports financial planning and analysis

****Supply Management System:****

- * Tracks inventory levels of various supplies
- * Sends notifications when supplies are running low and need to be reordered
- * Integrates with accounting system for accurate cost tracking

With these systems in place, you'll have a streamlined and efficient way to manage your salon's operations, finances, and supply chain.

I think that's everything! Is there anything else you'd like to add or change before we consider this project complete?

(And if not, I can help guide you through the next steps of implementing these systems.)

Stakeholder

Yes, that was it

Interviewer

We've covered all the key aspects of your salon's operations and finances. I think we have a comprehensive plan in place to help you streamline your business and improve efficiency.

Here's a final summary:

****Digital Booking System:****

- * Allows customers to book appointments online
- * Manages services, staff schedules, and customer information
- * Sends reminders for upcoming appointments
- * Integrates with accounting system for tracking income
- * Tracks supply inventory levels and sends notifications when supplies are running low

****Accounting System (FAST ACCOUNTS):****

- * Automates bookkeeping functions to reduce accountant workload
- * Provides real-time financial data and reporting
- * Enables easy reconciliation of transactions and accounts

Interview 16 Transcript

- * Supports financial planning and analysis

****Supply Management System:****

- * Tracks inventory levels of various supplies
- * Sends notifications when supplies are running low and need to be reordered
- * Integrates with accounting system for accurate cost tracking

****Key Performance Indicators (KPIs):****

- * Number of appointments booked per day/week/month
- * Most popular services and timeslots
- * Customer retention rates
- * Staff utilization rates
- * Revenue generated by service type
- * Inventory turnover rate
- * Average cost of goods sold
- * Customer review ratings
- * Net Promoter Score (NPS)

I hope this summary is helpful. If you have any further questions or need any additional assistance, please don't hesitate to ask.

Congratulations on taking the first step towards streamlining your salon's operations and improving efficiency!

(And if you're ready to move forward with implementing these systems, I can help guide you through the next steps.)

Stakeholder

Yes, how would be the implementation

Interviewer

Now that we have a comprehensive plan in place, let's discuss the implementation phase.

****Implementation Roadmap:****

1. ****Requirements Gathering:**** We've already completed this step by gathering all the requirements for your salon's operations and finances.

Interview 16 Transcript

2. ****System Selection:**** Based on our discussions, we'll select the following systems:

- * Digital Booking System: [Insert system name]
- * Accounting System (FAST ACCOUNTS): FAST ACCOUNTS
- * Supply Management System: [Insert system name]

3. ****System Configuration:**** We'll configure each system to meet your specific needs and requirements.

4. ****Data Migration:**** We'll migrate all relevant data from your existing systems to the new systems.

5. ****Testing and Quality Assurance:**** We'll thoroughly test each system to ensure they're working correctly and meeting your requirements.

6. ****Training and Support:**** We'll provide training and support to your staff to ensure a smooth transition to the new systems.

7. ****Go-Live:**** Once everything is tested and ready, we'll go live with the new systems.

****Implementation Timeline:****

The implementation timeline will depend on several factors, including the complexity of the systems, the availability of resources, and the level of testing required. However, here's a rough estimate of the implementation timeline:

- * System selection and configuration: 2-4 weeks
- * Data migration: 1-2 weeks
- * Testing and quality assurance: 2-4 weeks
- * Training and support: 1-2 weeks
- * Go-Live: 1 week

****Implementation Team:****

The implementation team will consist of the following members:

- * Project Manager: [Insert name]
- * System Administrator: [Insert name]
- * Data Migration Specialist: [Insert name]
- * Testing and Quality Assurance Specialist: [Insert name]
- * Training and Support Specialist: [Insert name]

****Budget and Resource Allocation:****

Interview 16 Transcript

We'll allocate a budget for each phase of the implementation process. The budget will depend on several factors, including the complexity of the systems, the level of testing required, and the availability of resources.

I hope this provides a clear overview of the implementation plan. Do you have any questions or concerns?