

Interview 4 Transcript

Interviewer

Hello, I'm GPTREI, your requirements elicitation assistant. Today, I will be gathering detailed information about your project needs to ensure we understand all requirements clearly. Before we begin, are you in line with the scope of this interview or do your expectations of this interview differ?

Stakeholder

I am in line with it and ready to start.

Interviewer

Great! Let's start with the basics. Can you please describe the primary purpose of your project? What problem does it aim to solve or what opportunity does it seek to exploit?

Stakeholder

I have hair salon with 12 employees. We are not using any computer at the moment. I would like to be able to better schedule the availabilities of my employees and keep track of appointments. To do so, I would like to have a booking system for clients. I would also like to reduce the work of my accountant by saving my receipts, expenses, wages etc. to my system. Another thing that could be done more efficiently is how I manage my supplies. The system should tell me how much I have left of supplies and especially notify me if something is running out. Lastly it should put these insights into reports. To conclude, I want to automise processes to save time and make them more clear to everyone.

Interviewer

Thank you for the detailed overview. It sounds like you need a comprehensive management system for your hair salon. Let's break down your needs further so we can understand all the specific requirements.

Starting with the booking system:

1. **Booking System:**

- How do you currently handle bookings? For example, is it through phone calls, walk-ins, or a combination?
- Would you like the booking system to be accessible online for clients, or will it be managed internally by your staff?

Next, let's discuss employee management:

2. **Employee Scheduling:**

- What are your current practices for scheduling employee shifts? Is it fixed, rotational, or flexible?
- Do your employees have different roles (e.g., stylists, receptionists), and if so, do their schedules need to accommodate these roles?

Let's talk about accounting now:

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3. **Financial Management:**

- How are you currently managing your financial records, and what specific functionalities do you need from the new system (e.g., invoicing, payroll, expense tracking)?
- Would you need the system to integrate with existing accounting software or would a standalone solution suffice?

Lastly, supply management and reporting:

4. **Supply Management:**

- How often do you replenish supplies, and what kinds of supplies are crucial for your salon (e.g., hair products, tools)?
- How detailed do you need the inventory tracking to be (e.g., by item, by type, by brand)?

5. **Reporting:**

- What types of reports are you interested in generating (e.g., sales reports, employee performance, inventory usage)?
- How often would these reports be used? daily, weekly, monthly?

Once we have these details, we can delve deeper into user interface preferences, security concerns, and any other specific requirements you might have.

Stakeholder

1. Currently the client walk in and make appointments or just straight away get their hair done. I would like to have the system online accessible for the clients
2. We have 8 full time and 4 part time emolyees. Shifts can be flexible in some parts but a fixed base would be nice. Bes ure that full times staff has a similiar amount of hours. During buisy times enough emolyees should be there. Part time employees should only work the time that they are hired for. Manicure and facials are only done by part time staff, the rest is carried out by everyone.
3. Currently I have a book for my records. All the points you mentioned sound good. As I have no software right now there is nothing to integrate.
4. Normally I look once a week at my supplies and then order them. With the new system I would like to get notifications when stuff is running low. So I can also order it more times a week. Curcial supplies are tools like scissors, comb, etc., and things like hair dye, conditioner, shampoo, soap, etc. . I also need water and coffee to serve to my customers. The tracking should show item, type, brand, age and the amount.
5. I am not interested in emoliyee performance but in Inventory usage, sales reports, buisy hours and the how often certain customers visit.

Interviewer

Thank you for your detailed responses. This gives us a clearer picture of your needs. Let's dive into a few more

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specifics:

Regarding the **online booking system**:

1. Would you need the booking system to manage and display different types of services (e.g., haircuts, manicures, facials) and their durations?
2. How far in advance should clients be able to book appointments, and would you like to impose any restrictions (e.g., not booking within the same day)?

For **employee scheduling**:

3. Would you like the system to send notifications or reminders to employees about their upcoming shifts?
4. Would employees need the ability to request shift swaps or time off through the system, and how would you prefer to manage approvals?

In terms of **financial management**:

5. Would you require the system to generate invoices and receipts for client services, or just keep records of transactions?
6. Do you need any specific financial reports for tax purposes or business analytics?

For **supply management**:

7. Would you like the system to automatically place orders for supplies when they run low, or just send notifications for manual ordering?
8. Are there any particular suppliers you consistently use, and do you need the system to interface with their ordering platforms?

Finally, about **reporting**:

9. How would you like to access these reports (e.g., via download, email)?
10. Are there specific formats you'd prefer for the reports (e.g., PDF, Excel)?

Your answers will help us define the system requirements more accurately and ensure it meets all your needs efficiently.

Stakeholder

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1. yes
2. They can book a month in advance. They can book different services on the same day but not the same service twice a day.
3. Yes, the system should give them their weekly schedule and then update and remind them of their appointments.
4. Swapping in the system would be great. It would need approval by the customers that already booked appointments or otherwise it should offer alternative appointments with the person. It does not need approval from me but I would like to be notified of changes.
5. It should also show receipts for clients. The rest is for internal use like for generating tax returns.
6. It should be prepared so that my accountant can quickly create the tax returns. But it does not need to make them.
7. I want to get notifications and then do the ordering myself.
8. No, I can do that myself.
9. I would like to get a monthly email with the reports. Other changes or notifications about low supplies should be received by email.
10. I prefer both Excel and PDF depending on the report. Sometimes receiving both details in Excel and additionally more visual representations in PDF would be great.

Interviewer

Thank you for providing such clear and detailed information. Based on your responses, we'll refine the requirements further. Here's a summary of the key functionalities for your system:

Online Booking System

1. ****Service Management****: Display and manage different types of services (e.g., haircuts, manicures, facials) with specified durations.
2. ****Booking Restrictions****: Allow clients to book up to a month in advance; restrict clients from booking the same service twice in one day.
3. ****Multi-Service Booking****: Enable clients to book different services on the same day.

Employee Scheduling

1. ****Weekly Schedule Notifications****: Send employees their weekly schedules and updates with reminders about upcoming appointments.
2. ****Shift Swapping****: Allow employees to request shift swaps within the system, ensuring that swaps requiring client approval are handled seamlessly, and providing notifications of these changes to you.

Financial Management

1. ****Client Receipts****: Generate and provide receipts to clients.
2. ****Internal Records****: Maintain records for internal use such as invoicing, payroll, and expense tracking.

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3. **Tax Preparation**: Prepare reports that facilitate quick creation of tax returns by your accountant.

Supply Management

1. **Low Stock Notifications**: Notify you when supplies are running low, without automatic ordering.
2. **Detailed Tracking**: Track supplies by item, type, brand, age, and quantity.

Reporting

1. **Monthly Report Emails**: Send monthly emails with reports on inventory usage, sales, busy hours, and customer visit frequency.
2. **Report Formats**: Provide reports in both Excel and PDF formats; Excel for detail and manipulation, and PDF for visual representation.

Communication

1. **Email Notifications**: Send notifications about low supplies and scheduling changes via email.

To finalize, let's touch upon a couple more areas:

1. **User Interface**:

- Do you have any specific preferences for how the interface should look and feel, both for staff and clients?

2. **Security and Permissions**:

- Are there particular security measures or access controls you'd like in place to protect sensitive data (e.g., staff information, financial records)?

Your answers will help ensure the system is designed exactly to your specifications and is user-friendly for both you and your team.

Stakeholder

1. It should be very easy to understand, very intuitive. The colors shouldn't be very bright but rather calming. It should be possible to book an appointment in less than 5 steps.
2. financial records and staff information should only be accessed by my accountant and me. No other staff should be able to look at these things on the software. If I want to share them I can do that by sharing the file.

Interviewer

Thank you for providing those additional details. With your preferences in mind, here's the refined system summary:

Online Booking System

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1. ****Service Management****: Display and manage different types of services (e.g., haircuts, manicures, facials) with specified durations.
2. ****Booking Restrictions****: Allow clients to book up to a month in advance; restrict clients from booking the same service twice in one day.
3. ****Multi-Service Booking****: Enable clients to book different services on the same day.
4. ****User Interface****: Ensure the booking process can be completed in fewer than five steps. Use calming colors and maintain an intuitive, easy-to-understand layout.

Employee Scheduling

1. ****Weekly Schedule Notifications****: Send employees their weekly schedules and updates with reminders about upcoming appointments.
2. ****Shift Swapping****: Allow employees to request shift swaps within the system, ensuring that swaps requiring client approval are handled seamlessly, and providing notifications of these changes to you.

Financial Management

1. ****Client Receipts****: Generate and provide receipts to clients.
2. ****Internal Records****: Maintain records for internal use such as invoicing, payroll, and expense tracking.
3. ****Tax Preparation****: Prepare reports that facilitate quick creation of tax returns by your accountant.
4. ****Access Control****: Restrict access to financial records and staff information to only you and your accountant.

Supply Management

1. ****Low Stock Notifications****: Notify you when supplies are running low, without automatic ordering.
2. ****Detailed Tracking****: Track supplies by item, type, brand, age, and quantity.

Reporting

1. ****Monthly Report Emails****: Send monthly emails with reports on inventory usage, sales, busy hours, and customer visit frequency.
2. ****Report Formats****: Provide reports in both Excel and PDF formats; Excel for detail and manipulation, and PDF for visual representation.

Communication

1. ****Email Notifications****: Send notifications about low supplies and scheduling changes via email.

Security and Permissions

1. ****Access Control****: Ensure financial records and sensitive staff information are accessible only to you and your

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accountant. Other staff will not have access to these sections in the software unless shared explicitly by you.

This comprehensive list should cover everything you're looking for in the new system. Is there anything else you would like to add or any other features you think might be useful?

Stakeholder

No, that sounds great.

Interviewer

Fantastic! We have a comprehensive understanding of your needs. Here's the final summary of the key functionalities for your new hair salon management system:

Online Booking System

1. ****Service Management****: Manage different service types and durations.
2. ****Booking Restrictions****: Allow bookings up to a month in advance, restrict same service twice a day.
3. ****Multi-Service Booking****: Enable booking different services on the same day.
4. ****User Interface****: Simple, intuitive, calming colors, and complete booking in fewer than five steps.

Employee Scheduling

1. ****Weekly Schedule Notifications****: Send schedules and appointment reminders.
2. ****Shift Swapping****: Facilitate shift swaps with client approval when necessary, notify you of changes.

Financial Management

1. ****Client Receipts****: Generate and provide client receipts.
2. ****Internal Records****: Invoicing, payroll, expense tracking.
3. ****Tax Preparation****: Facilitate tax return preparation.
4. ****Access Control****: Restrict access of financial records to you and your accountant.

Supply Management

1. ****Low Stock Notifications****: Notify when supplies are low.
2. ****Detailed Tracking****: Track items by type, brand, age, and quantity.

Reporting

1. ****Monthly Report Emails****: Send detailed and visual reports monthly.
2. ****Report Formats****: Provide reports in both Excel and PDF formats.

Communication

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1. **Email Notifications**: Notify about low supplies and schedule changes.

Security and Permissions

1. **Access Control**: Financial records and staff information accessible only to you and your accountant.

This should cover all your requirements for automating and managing your salon processes efficiently. If you need further refinements or have any future additions, feel free to reach out.

Thank you for your time and detailed input. Best of luck with implementing your new salon management system!