Client Precondition Report Template

1. Company Information

- **Company Name: Foot Canada Training**
- **Primary Contact Person: Julie Gauthier**
- **Email Address: julie@footcanada.ca**
- **Website: www.footcanada.ca**
- **Location / Time Zone: North Bay, ON (Eastern Standard Time)**

2. Team Structure & Required Skills

a. Team Composition

This project will require good collaboration with students working together with various skills. It will be imporant for there to be a team leader who makes sure that each aspect of the project is being completed, that the overall esthetic is clean and simple, user-friendly, and that it is meeting the needs of the company. Students will have much more knowledge about programming and possible solutions, so the company will expect them to brainstorm together and present a few options before getting started. Students should feel free to highlight skills and talents they already have, or try something new they'd like to learn more about.

b. Required Baseline Skills

- General programming experience
- Basic understanding of software development practices
- Willingness and ability to learn new frameworks or tools
- Understanding of Typeform and Wordpress
- Programs allowing shared access for admin users, while maintaining security
- Thinkific and other online-learning tools

c. Skills to Be Developed During the Project

- design with the end-user in mind (non-sophisticated users)

3. Project Title & Acronym

- **Project Title: Documentation & Student Interface**
- **Acronym (for GitHub repository): DSI**

4. Project Overview & Problem Statement

Provide a clear description including:

- The problem your project addresses
- Background/context
- Target users
- Goals and expected impact

This project might seem basic, but will be very impactful on how we do business and our relationshiop with our students. We provide education to post-grad nurses in foot care. Our courses are online and in-person. Our educators are scattered all over Canada. We are NOT techy people, so we need solutions that bring our admin, educators and students all together. We need to be able to submit and store documents and assessments in a secure way, so that the material is easily accessed and searchable by admins with high-level access, and a database that is very basic and searchable by the public. We use very simple tools right now, because our admin team is also not techy, so all of the solutions need to work with our existing programs, or integrate in such a way that we can use them and do basic upkeep on our own without hiring programmers or webmasters.

We don't know what we don't know....so any and all suggestions will be welcome. This is an opportunity for you to be creative, try new programs, push yourself.

In the end, we are hoping for an interface that will allow educators to upload documents and materials, complete and student assessments, from their phones, tablets or desktops, that will also allow for searchable data storage. This would allow our admin team to stay small, save our educators time, make sure our data storage was secure and accurate – which will become even more important by later this Spring when a national certification program might be announced and we will need to be able to confirm student records.

5. Solution Overview & Core System Components

Please identify the following:

- **Core MVP Deliverables:** An improved data-submission tool/system that will store data in a searchable way.
- **Stretch Goals (Optional):** basic searchable data base for the public, to find out if a nurse took our course and when.

6. Technical Considerations

Specify:

- Data includes student records and notes, so needs to be secure
- Data needs to be stored for atleast 10 years and then archived (never deleted)
- Tool needs to be easy to use, appropriate for phone, tablet or desktop
- Secure entry for admin, different permissions available
- Very basic tools currently being used: wordpress website, typeform, Sync, Thinkific...

7. Innovation & Competitive Advantage

We are a really odd team of nurses, who are all self-employed, working together to bring better foot care nursing education across Canada, and promoting better standards of care. We work in all provinces, on our own, but come together for this. We work in online, techy world, with no experience at all. We know that if we can make our courses and services more accessible, and our processes more efficient through the use of technology, we will be able to help improve our client's health dramatically. But we have no idea how, and do not have the money to invest in complicated tools or support.

8. Proposed Implementation Timeline (13 Weeks)

I would expect a team meeting to discuss the project scope week 1, a week of team brainstorming and 2-3 solutions to be proposed/discussed. 4 weeks of designing, 3 weeks of testing, 1 week of 'tweaking' and implementation, final week of feedback and debriefing

9. Deployment & Support Expectations

Specify any requirements related to:

- We would like the program to build on our existing website (wordpress) or educational platform (Thinkific), but are open to changes. All access codes will be provided.
- We currently use a file share SYNC but would be willing to change
- Typeform currently used for forms
- Currently use BREVO for CRM but willing to change

10. Confidentiality & Intellectual Property

Only privacy concern is keeping our student data secure. No personal identifying information, so not a big concern.

11. Proposed Success Metrics

- is the interface user-friendly, is data storage searchable, does it save me time, can the whole team use it seamlessly

12. Mentorship & Communication Plan

Specify:

- Weekly meetings would be great, but could be bi-weekly if students are comfortable with their roles with email updates
- Simple virtual meetings through microsoft teams or something similar
- Julie is main point of contact
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13. Additional Notes (Optional)