finappster Sigma Meeting Two Minutes

Date | time: 20/07/21 2:00pm-4:00pm *Location:* WA3 Study Room 5

Meeting called by:	All	**Attendees:** Chris Stehlin, John Sangalang, Peter Scandle, Jose Santo
Type of meeting:	Weekly team meeting	
Facilitator:	Chris Stehlin	
Note taker:	John Sangalang	
Timekeeper:	John Sangalang	

Action Items

Item:		Assigned to:	Deadline:
1.	**Minutes from last meeting:**	Note	N/A
	- Started meeting off by going through Leeanna's email after the Friday meeting, and the minutes that were used during that meeting.		
	- Most of the items in this meeting's agenda are actually action items from the past meeting, just a note.		
2.	**Brief discussion on Notion software use:**	Note	N/A
	- Jose briefly discussed with Peter on how to create a new page in Notion.		
	- Discussion on Notion's place in the project was also discussed. For now, it was decided that draft notes will be used in Notion, with a focus on the documentation for this project making use of Notion, but the Trello board will be used for everything officially relating to development.		
3.	**Discuss KiwiSaver findings:**	All	23/07/21, 9am
	- Discussion of each team member's KiwiSaver scheme and discussion of the investments and the ethics involved was brought up. John and Chris had these records, but still needed to do more research into the investment ethics. Peter and Jose still need to get access to these records from their providers.		
	- Discussion of these matters moved forward to Friday morning, before the proposed client meeting		
4.	**Define finappster Sigma's scope:**	Note	N/A
	- Analysis of what finappster's purpose for a typical user was discussed first. What is a user going to use this application for? As briefly covered in the initial meeting,		

our team's likely goal will be to properly display the data in some graphical format (like the sunburst chart on the finappster main page) and to properly implement a quiz that helps a user determine what values matter to them.

- Brainstormed ideas on how finappster Sigma can add properly to the project, not just the core ideas that are being considered, but other options too. Options explored are on the whiteboard photo in the resources section. These options being considered include:

  i) Measuring the sustainability of user profiles via something like the sunburst chart (with an overall chart and some display for each individual investment being
  ii) Tracking performance of investments (specifically shares).
  iii) Revamping the quiz to only include values that are backed up by data from the UN Sustainable Development Goals resource.
  iv) The idea of providing recommended investments based off selected values is also being considered.
  v) A general goal of making the web and mobile experience remain consistent and smooth for the parts of the application we are working on.

- Options brainstormed but probably not within finappster Sigma's scope include implementing a mobile application (which would most likely require redoing the entire codebase from scratch) and refactoring and bug fixing previous teams' work that involve sections outside of Sigma's current proposed scope.

5. **Decide upon date and time of next client meeting**	Note	N/A

- Meeting was unanimously decided between team members to be at 10am on Friday with Leeanna and Badger. Peter has sent an email off to Barry and Leeanna to confirm.

6. **General discussion/scope related/formulation of questions to ask Leeanna**	All	23/07/21, 9am

- Company ethics data access
  The scope covered earlier seems achievable on the premise that company ethical data (via the UN Development Goals) exists in a numerical format. Team believes that Leeanna mentioned she has this data, but we were unable to easily locate it during the meeting online ourselves. Team to talk to Leeanna about this in the client meeting.

- <u>Shares/crypto ethics information display discussion</u>
Implementation of shares on the finappster app was not functional last the team checked. It was also covered in this meeting that crypto is anonymous currency, and thus there does not seem to be a method of tracking it or the ethical ramifications of those invested in it. Discussing this with Leeanna and finding out how the shares bug is going (as using the UN's data for shares is likely going to be the main draw of the app, not via crypto).

- <u>Quiz implementation – suggest or display only</u>
With the assumption that the data to determine the ethics behind companies in a user's portfolio is easy to use (numerical values allowing easy graphing and designating user value priorities), would Leeanna want the quiz to suggest other companies based on their selected values? The alternative is to just give a static result of what a user's priorities are, and they can make decisions by looking at this result manually.

- <u>Database access and discussion</u>
Three databases are being used for finappster so far. Whether to make a fourth database or to use an existing one was discussed. Ultimately the team wants to look at the current databases first before making a call on this, so the hope is Leeanna will provide access to this.

7. **Screenshots of mobile experience**   Chris Stehlin   23/07/21, 10am

- Chris to provide screenshots of mobile experience to Leeanna as per her request. Chris has advised in previous meeting that the formatting of various aspects on his mobile device was not user friendly.

Other Information

Observers: N/A

Resources: Brainstorm on whiteboard during meeting on last page.

Special notes: N/A

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pt1 ⟶ ° Measure sustainability of portfolio

? ✓ ° Track performance of investment

- Mobile UX overhaul — Bug fix/refactor

? ° Quiz
  - Determine user's values objectively
  ? - Suggest next investments

⟶ ° Decent UX across both mobile & web

• Are we looking to (suggest) or track? → QUIZ

• People, Partnership, Place, Prosperity, Planet
  — Can be seen on sunburst
  — Objective?