

finappster Sigma Client-Meeting Minutes

Date | time: 6/08/21 9:30am-12:00pm Location: WZ Mojo Cafe

Meeting called by:	All	Attendees:	Chris Stehlin, John Sangalang, Peter Scandle, Jose Santos, Barry Dowdeswell, Leanna Kohn-Hardy
Type of meeting:	Weekly team meeting	Please read:	N/A
Facilitator:	Chris Stehlin	Please bring:	Laptop
Note taker:	John Sangalang		
Timekeeper:	John Sangalang		

- All N/A

Action Items

Topic		
✓ User story prepared earlier	All	N/A
- Chris presented the user journeys we had constructed on selling a product and an admin support		
- Leanna gave positive feedbacks on her end and is proud of our progression		
✓ Combining all user journey:		
- Barry mentions the combination of the user journey can be used as the introduction for our project proposal		
- Leanna emphasized that during wireframing our journey we must keep in mind that we should get the information within 3 clicks or somewhere along the line	All	N/A
- The main question of the combine user journey is when do we prompt the user to login, so that we can save their data		
✓ Assignment:		
- Wireframing the user journey	All	N/A

Other Information

Observers: N/A

Resources: N/A

6/8/21 - Week 4 Client Meeting

Project proposal - early week 6

Rough is fine!

* Unification of our journeys

• Unified login screen across user types

1. Add current fund / get P score

Investment provider: after ^{fund input} quiz completion:
x users are aligned with your fund.

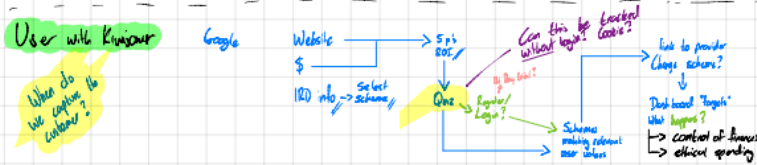
Flash out screens (clearing ID)

If suggesting a layout, background functionality?
Cookies?
Questions?
Intuitive?

Keep questions separate!

* Access everything with 2-3 clicks! → SIMPLE!

See ad? → Google → Collect info → Register/Login → Info Sharing → Submit → Result



Roll out of TIME
Will come back to this!

Morning meeting?
Bum - busy 2-4 Monday

Quiz probably user only - investment provider should be factual → based off constituent data from factual sources for each share if possible

Questions

- Size of scope - big?
- Quiz for investment providers?
- Should we meet Tom?
- Proposal?
- PRESENTATION