Project Proposal - *finappster Sigma* (Version 4)

Version History

Version	Details	Author	Date
One	Initial Draft	finappster *Sigma*	08/08/2021
Two	Draft	finappster *Sigma*	12/08/2021
Three	Draft	finappster *Sigma*	15/08/2021
Four	Draft	finappster *Sigma*	23/08/2021

Key Stakeholders

Name	Student ID	Email
Chris Stehlin	1120279	prq5006@autuni.ac.nz
John Isaiah Sangalang	18017056	jsj6212@autuni.ac.nz
Jose Santos	17993442	sff4900@autuni.ac.nz
Peter Scandle	15922445	vzp7444@autuni.ac.nz
Barry Dowdeswell		barry.dowdeswell@aut.ac.nz
Leeanna Kohn-Hardy		leeanna.kohn-hardy@finappster.co.nz

Contents

Executive Summary

The finappster Sigma Project Proposal has been prepared for Leeanna Kohn-Hardy from finappster. finappster is a platform that allows users to align their financial investments with their ethical beliefs. Its goal is to present users with information about their current investments as well as recommend them potential investments to take. This will allow them to track the performance of their investments and provide insight into the social, environmental and governance factors that they have affected.

This project involves the design of a platform allowing investment providers to advertise investment funds to end users, with the goal of matching investor's ethics to schemes with similar goals. Once development of this feature is complete, it will provide finappster with a feature set that differentiates it from other competitors that are currently on the market. It is expected to commence on 12 July 2021 and conclude on 23 June 2022.

Once the team introductions of the team members are complete, we defined the rationale and goals of the project, outlining where finappster is currently and what the client will gain out of our project. Following this, we laid out the scope statement ***and***

One of the main risks for this project is COVID. As we are currently within the midst of the pandemic, we are at ***risk*** of both entering lockdown and thus having to work from home, and having stakeholders fall ill or potentially die due to the virus.

- Scope
- Time
- Method
- Risks
- Cost

Still needed:

1. Cover page – Pete (later)
2. ~~Rational for the project (justification still needs to be done) - pete~~
3. Scope statement needs to be refined - pete
4. Methodology revamp potentially add references… - pete
5. ~~Coding standards revamp? (Not sure whether this is needed) - pete~~

6. Team Contract – all together, rip from SDP - Pete
7. Project charter (do at the end) - Pete
8. ~~Revamp stakeholder register (investors, investment providers, Ramesh, mentor, client, itpm documentation) - pete~~
9. Stakeholder management strategy - pete
10. ~~Communication management plan (minutes) - john~~
11. ~~Feasibility study document~~ – ~~Don't need~~
12. Requirement's document (Just add to the existing requirements in the document instead)
13. ~~Project Schedule/Work breakdown structure~~ -chris
14. Milestone report revamp – what is required here?? - john
15. Document that outlines skills needed for project - john
16. Team roles/tasks revamp - pete
17. ~~Team skills register including missing skills - john~~
18. ~~Training plan (upskilling?) - jose~~
19. Change management plan - jose
20. ~~QA plan - jose~~
21. ~~Risk register – chris~~
22. ~~Issue log - chris~~
23. ~~Project review plan~~ ~~Don't need~~
24. ~~Project cost – john~~

Introduction

Need a statement and a list of questions that we do not currently have answers to. Giving Alan a better perspective of the scope we are going to tackle

The following questions are questions that the development team is not clear on now that may have a significant impact on aspects of the scope of this project. They are listed here for context when reading the rest of this draft proposal.

Context

finappster is an informational tool to help users decide how to align their financial investments with their personal values.

Client

finappster was established in December 2016 by Leeanna Kohn-Hardy. Her experience working for various banks over the previous four years widened her knowledge and understanding of share market investment and enabled her to identify a business opportunity. Leeanna's inspiration to create finappster arose from a gap she saw in the market, with people wishing to make ethical investments but struggling to locate the information to do so.

Project Purpose

This purpose of this project is to build a plan that will ultimately implement one of finappster's main missing parts, the ability to align your financial investments with your personal values. Prototyping of some of the first feature priorities to accomplish this will also be a focus.

Opportunity, Problem or Need

Leeanna has been working with AUT's Research and Development program since 2019, and finappster *Sigma* is her fifth team. Through her time at AUT, she has worked with her previous R&D teams to create the basic framework of the application. There is now an opportunity to build upon this foundation and begin planning and prototyping one of the main overarching features that finappster needs – the ability for users to align their financial investments with their personal values.

Project Justification

The client has identified a large business opportunity for *finappster* to target, and this is the key reason she began the project in the first place. This opportunity involves allowing investors to see the ethical impacts of their investments, involving both the individual shares they own as well as any investment funds they may be a part of. Another part of this goal is to allow investment providers to advertise their investment funds on the platform, having the ethical impact of the fund being clearly and transparently displayed. Through this, both users and investment providers will be drawn to use the site.

Current Situation

finappster *Sigma* is the fifth R&D team to work with Leeanna and continue development on the finappster application. The initial team, finappster *Alpha & Omega* completed their development on semester 1, cleaning up the initial code that was done by a team outside of AUT. Next finappster *Rho* took over to complete development of Spreadsheet 2.0, providing a more meaningful place for Leeanna's data to be stored. When finappster *Delta* team took over in Semester 2 2020, their team was primarily tasked with

merging both teams previous work, establishing a unified development pipeline and taking it live. Upon the completion of finappster *Delta's* work in Semester 1 2021, finappster *Tau* began implementing API data fetching for obtaining the UN sustainable goals data and share data (to our knowledge, unsure of the specifics of the data they are fetching at this point).

The website is currently live and accessible at https://app.finappster.co.nz where we can view features like share and cryptocurrency tracking, ability to view a user's portfolio and its performance, a secure two-factor authentication, etc. However, several core features are yet to be developed.

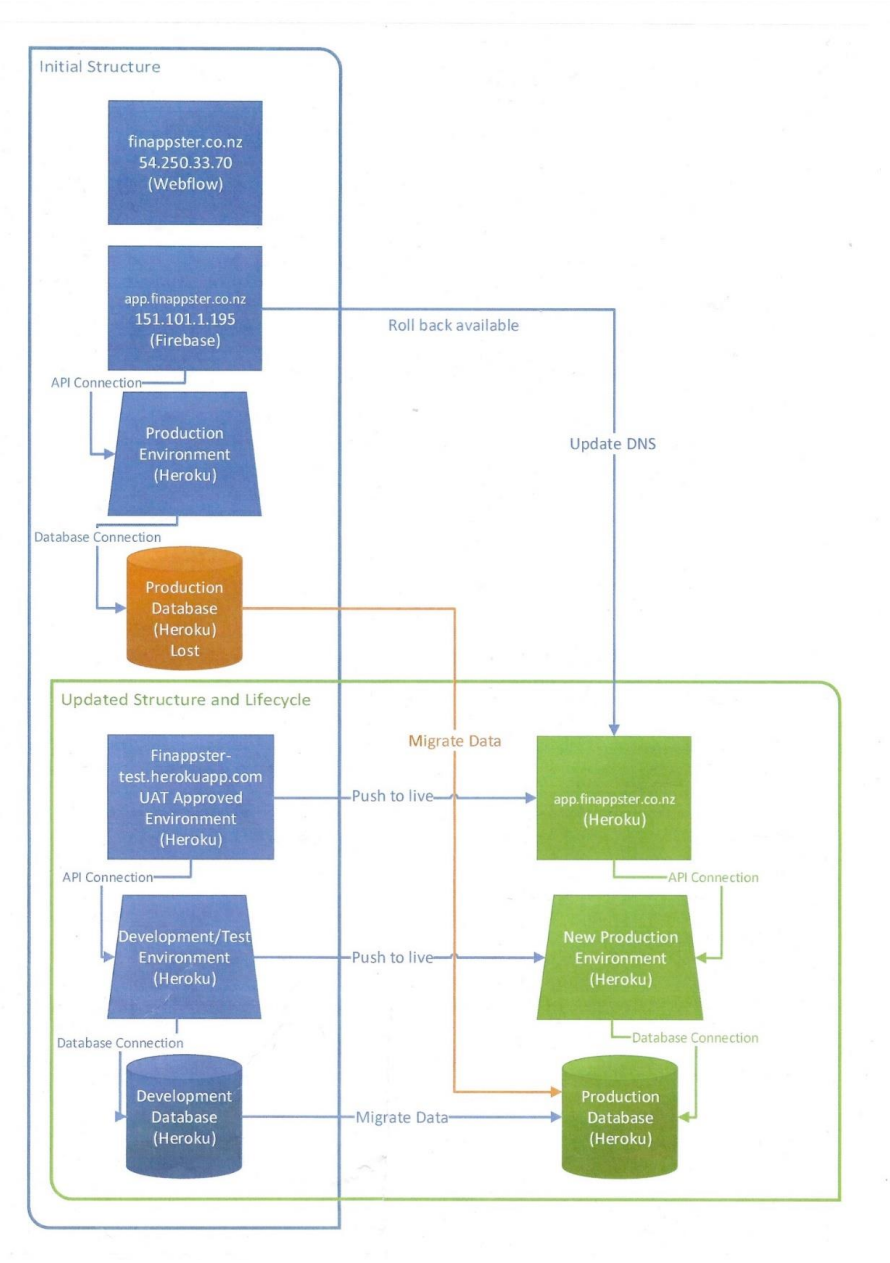


Diagram *showing the finappster development timeline*.

Scope and Objectives

Project Objective

Over the next year, the project's objective will be to design and begin prototyping a core missing piece of finappster, the ability to align your financial investments with your personal values. The design process will come first, documenting, and illustrating the user journey of investors and investment providers, which, when implemented with finappster's existing infrastructure, should in theory achieve this goal.

Following that, prototypes of much of the underlying features of this objective that were mapped out in the design phase will be implemented by finappster *Sigma*. The design and prototypes developed over this project will serve as foundation for future teams to build upon.

Scope Statement

Within this project we are looking to design the missing feature from the *finappster* application. This involves a feature for investors to advertise fund investments and KiwiSaver schemes to end-user investors, with a clear focus on the ethical impact of specific fund as well as their return. This would allow investors to see what impact their shares are having on the world around them. Once this is complete, we will begin prototyping the end-user functionality, consisting of a quiz to assess their personal ethical values as well as the backend work required to calculate this. Following on from this, we will develop a suggestion feature to recommend future investments based off alignment with a user's individual ethical values.

~~The scope of this project consists of planning out and then prototyping the big 'missing piece' from finappster. This will build off the features already present within finappster, allowing users to track the ethical performance of their fund investments. The scope has not been fully actualized yet; further discussion with the client and collaboration with finappster *tau* to obtain access to various sources of data will need to continue before this scope will be in its final state.~~

To accomplish this, the following steps will be taken. Note however that the order and content of these steps are subject to change pending further discussion with the client and finappster *tau*.

- Finish discussing planned scope with client (finish discussing admin user journey, discuss questions outlined in introduction).
- Examine, sanitize, model, and document the databases present within the finappster system
- Create a model to display the flow of data within finappster
- Examine data streams/database by finappster tau, determine if they have the data streams with the content and form, we assume they are in, otherwise adjust scope dependent on the state of them otherwise.
- Review existing finappster infrastructure in detail, making sure intended scope is not overlooking anything significant.
- With the scope clear, finalize the overall user journey of investment provider, investor, and administrator users. Make use of wireframes and other designs to make the intended implementation of the project objective clear for the current development team and future teams.
- Collaborate with Leeanna to develop a comprehensive list of all possible user stories that are relevant to this project.

- Take a key few of these user stories through the development pipeline, working on the ones with the highest priority first. (Product backlog → Sprint backlog → in development → UAT (dev team) → UAT (Leeanna) (← Back to a previous step if UAT (Leeanna) fails) → Done).
- Prototype lower priority user stories if time allows.

Commented [JIS1]: Scope Statement Document

Project Requirements

Functional Requirements

- The investment provider user shall register to advertise their scheme/fund.
- The investment provider shall be able to login to the website.
- The investment provider shall be able to add their scheme/fund.
- The investor user shall register to view scheme/fund information.
- The investor user shall be able to do the quiz.
- The user shall be able to view their values upon doing a quiz.
- The system shall record a user's data in the database upon said user logging into the website.

Non-Functional Requirements

- All key functionalities should be accessible within three clicks.
- The system shall provide the current pricing of a fund provided by an investment provider.
- The system shall display user's quiz result values within three seconds.
- The user shall be able to complete the quiz.

Regulatory Requirements – may need to talk to Leeanna about this

- As *finappster* is acting as an advisor, we cannot be selling any investments directly???
-

Summary of Project Deliverables

Key Milestones

Milestone Title	Date
First Client Meeting	17 June 2021
Project-Kick off	13 July 2021
Mid-Project Proposal Draft Complete	13 August 2021
User stories defined	October 15, 2021
Project Proposal Complete	October 15, 2021
Mid-Project Review	x
Final Project Poster	End of Semester 1, 2022
Final Project Presentation	End of Semester 1, 2022

Project Methodology

Introduction

Agile

Within the Agile methodology, change is expected. As individual sprints are only measured in weeks, there is significantly more flexibility available if the client needs /desires change throughout the project. It also allows for more accurate representations of what a client wants in their project, as they have constant say in how it is developed, iteration by iteration (Kumar & Bhatia, 2012).

Scrum

Scrum is a methodology that implements the framework laid down by Agile. It works by dividing the work required into a series of sprints, and communication is maintained through the sprints using daily stand-up meetings. Change is expected and encouraged but is restricted to only occur generally between sprints. Completing work in sprints allows for constant feedback on the iterating product.

Kanban

Kanban is a popular framework used to implement agile and DevOps software development. It requires real-time communication of capacity and full transparency of work. Each work items are visually posted on the Kanban Board. This methodology focuses on a "just in time" approach and is much more focused around change at any time, rather than Scrum's more fixed focus on changes only occurring between sprints.

Method being employed: Scrumban (Scrum/Kanban mix)

Reasoning

We are considering *Scrumban*, a methodology that is a hybrid mix of *Scrum* and *Kanban*. The mix we will use is closer to Scrum but uses a few key elements from *Kanban.* We are planning this because the development team is more familiar with Scrum but is also interested in employing a few methodology characteristics from Kanban as the client has used them with previous teams and had good levels of success.

Once development starts, a typical scrum setup on Trello will be followed, with sprints, a product backlog, standup meetings, and other standard Scrum features. Our Trello board differs slightly from traditional Scrum though, as it has more columns than a Scrum board would typically have, encompassing the traditional Scrum columns of "Product Backlog", "Sprint Backlog", "In Development" and "Development Complete", but including "Sprint UAT", "Leeanna UAT" and "Merged and Completed". This allows for more meaningful, granular progress to be displayed on individual cards as well as giving them the freedom to move around the board's columns as required.

As for communication and team interaction, elements from both Scrum and Kanban will be employed. Regular status update meetings will occur, but not at the frequency and in the same format as Scrum does (i.e., daily standup meetings), as these will only be held when the team feels it is necessary. Any changes that are made will be added to the bottom of the Product Backlog, and if we are able to get to them within the time and scope of the project will be addressed when required.

Approach

- In Person Meetings
    - Best way where possible
    - Facilitates effective communication and collaboration
- Teams
    - Great way to share documents and work together on them with the team
    - Also effectively allows communication with Leeanna
- Discord
    - Allows for effective communication within the team

Project Management Resources

- Trello
- Discord
- Teams
- Notion
- Weekly Meetings

Coding Standards

There are several common coding standards that we will follow in completing this project. These are listed below.

- Review and test code before approving a Pull Request
- Make code as modular as possible
- Every feature and fix must have its own branch
- Variables, functions, and components must be named correctly
- Code must be easily readable and correctly white-spaced
- Components should be placed in separate folders
- Arrow functions are preferred to normal functions
- Have folders with containers and Higher Order Components
- Keep components simple and clear
- Import libraries in the order they are used

Beyond this, the project has an existing structure, with GitHub repositories created by the teams that have previously worked on this project. As these repositories will be used alongside the ones that we are creating, we will follow the existing code style used by the other teams to ensure that the app has consistent, cohesive code throughout.

Skills Analysis

Group	Skill	Chris	John	Jose	Pete	Total
		Score (1-5)				
Databasing	MYSQL/OracleSQL	3	3	3	4	13
	PostGRES	1	4	3	2	10
	MongoDB	3	4	3	3	13
	Firebase FireStore	4	2	2	2	10
Web Technology	JavaScript	3	4	4	2	13
	Node,js	3	4	3	2	12
	React	3	3	4	2	12
	Azure	1	3	3	1	8
	Heroku	3	4	3	3	13
	GitHub / Git	5	5	4	5	19
	HTML/CSS	2	2	4	2	10
Programming Languages	Java	4	4	5	4	17
	C#	1	3	1	2	7
	Python	1	1	2	3	7
	C / C++	2	1	2	2	7
Project Management Tools	Microsoft Project	3	1	2	3	9
	Trello	5	3	5	5	18
	Asana	1	1	1	1	4
Design Tools	Figma	2	2	4	2	12
Personal Skills	Verbal Communication	5	3	3	5	16
	Written Communication	5	3	3	5	16
	Leadership	5	1	2	5	13
	Change Management	4	2	2	5	13
	Learning and Development	4	4	4	4	16
	Project Management	5	2	3	5	15
	Time Management	4	3	3	4	14
finappster Related	Financial Knowledge	3	2	1	3	9

Key Skills Required

Since we are the fifth AUT finappster team, we would need to learn how to collaborate with the current development teams, such as Finappster Tau who are working in tandem with our team for semester 2, 2021. Additionally, we would need to have knowledge in API principles, consuming other sources and being consumed via REST clients. A basic understanding both web application security and filtering in financial data from databases to help us in building out our scope, and lastly an understanding in machine learning for a recommendation system, particularly context-based machine learning.

Appendix

Auckland University of Technology
Bachelor of Computer & Information Sciences
Research & Development Project

Disclaimer:

Clients should note the general basis upon which the Auckland University of Technology undertakes its student projects on behalf of external sponsors:

While all due care and diligence will be expected to be taken by the students, (acting in software development, research, or other IT professional capacities), and the Auckland University of Technology, and student efforts will be supervised by experienced AUT lecturers, it must be recognised that these projects are undertaken during student instruction. There is therefore no guarantee that students will succeed in their efforts.

This inherently means that the client assumes a degree of risk. This is part of an arrangement, which is intended to be of mutual benefit. On completion of the project, it is hoped that the client will receive a professionally documented and soundly constructed working software application, some part thereof, or other appropriate set of IT artefacts, while the students are exposed to live external environments and problems, in a realistic project and customer context.

In consequence of the above, the students, acting in their assigned professional capacities and the Auckland University of Technology, disclaim responsibility and offer no warranty in respect of the "technology solution" or services delivered, (e.g., a "software application" and its associated documentation), both in relation to their use and results from their use.

Risk Register

Risk description	Date raised/ re-reviewed	Potential consequences	Inherent risk (before controls) 1= Low, 5= High			Safety controls	Assurance	Residual risk (RR) (remaining risk after controls have been applied)			Risk owner
			Likelihood (L)1-5	Consequence (C)1-5	Inherent risk (L x C)			Likelihood (L)1-5	Consequence (C)1-5	Residual risk (L x C)	
Coronavirus, effect on family, friends, self	20/08/21	Delays in completion of tasks by staff due to possible sickness.	3	5	15	Get vaccinated, stay home as much as possible throughout lockdown.	Legal requirement to stay home except for absolute necessities.	2	4	8	All project staff
General sickness effect on family, friends, self	20/08/21	Delays in completion of tasks by staff due to possible sickness.	2	3	6	Stay home as much as possible throughout lockdown.	Legal requirement to stay home except for absolute necessities.	1	2	2	All project staff
Project schedule not clearly defined	20/08/21	Project plan not clear and/or outlined scope not well defined, leading to lower quality product delivered to client or incomplete project.	4	5	20	Clear project plan, well defined scope, discuss with dev team exactly how we will design features we will develop.	Team discussions on this matter, development of project plan.	1	5	5	All project staff
Internet connection problems	20/08/21	As all class work for the past few weeks and for the foreseeable future will need to be done at home, having an internet connection is vital to passing.	2	5	10	Ensure your internet package is suitable, change plans to another one if needed.	Staff to check in on other project staff that don't make it to meetings or have been out of touch.	1	5	5	All project staff
Equipment needed for study stops working or is unavailable	20/08/21	As all class work for the past few weeks and for the foreseeable future will need to be done at home, having a laptop/desktop is vital to participating in this project (and any other coursework).	2	5	10	AUT may offer the laptop hire service again. Outside of that, take care to look after your devices at home so they don't break.	Staff to check in on other project staff that don't make it to meetings or have been out of touch.	1	5	5	All project staff
Can't access shared Microsoft Teams.	20/08/21	Delays in completion of assigned project duties for unknown amounts of time therefore deadlines are not met.	3	2	6	Team members to notify the group if they can't access teams' software suddenly.	Staff to mention this as soon as possible so other staff can assist.	1	5	5	All project staff

Issue Log

Issue #	Issue Description	Priority	Severity	Reported By	Assigned To	Date Reported	Resolution Date	Status:	Comments
1	Coronavirus Lockdown L4	High	High	Chris Stehlin	All	18/08/21	N/A	Open	No cases amongst project team, but we're all in level 4 lockdown until the government indicates otherwise.
2	Partially missed meeting – Peter needed to have his covid test	Low	Low	Peter Scandle	Peter Scandle	20/08/21	20/08/21	Closed	Peter had to have his covid test during a debrief meeting with our mentor. Team caught him up on what he missed.
3	Jose Santos Technical issues	Low	Low	Jose Santos	Jose Santos	19/08/21	N/A	Open	Jose's PC broke earlier in the semester and his laptop is having some memory issues. It's managing for now, but something to keep an eye on.
4	Misunderstanding of expected project proposal delivery timeline	High	High	All	All	18/08/21	N/A	Open	finappster Sigma delivered a draft proposal for their week 6 presentation, but it was supposed to be a final version. The team is working quickly to have a final version ready in the coming weeks, as well as more clearly defined scope.
5	Uncertainty of finappster tau data usability	High	High	Chris Stehlin	All	3/09/21	N/A	Open	finappster tau's data is a factor in delivering finappster Sigma's development scope. It's not unworkable if the data from tau can't be used, but depending on how they go will affect certain design directions on SDG data testing.

Work Breakdown Structure

1.0 Planning Phase

- 1.1 Team Contract
- 1.2 Project Purpose
- 1.3 Opportunity, Problem or Need
- 1.4 Project Justification
- 1.5 Project Objective
- 1.6 Project Cost
- 1.7 Project Charter
- 1.8 Stakeholder Register
- 1.9 Stakeholder Management Strategy
- 1.10 Risk Register
- 1.11 Issue Register
- 1.12 Milestone Report
- 1.13 Project Methodology
- 1.14 Quality Assurance Plan
- 1.15 Requirements Document
- 1.16 Skills Register
- 1.17 Coding Standards
- 1.18 Skills Analysis
- 1.19 Training Plan
- 1.20 Communication Management Plan
- 1.21 Scope Statement
- 1.22 WBS
- 1.23 Project Schedule
- 1.24 Change Management Plan
- 1.25 Financial industry upskilling
- 1.26 Explore KiwiSaver user journey
- 1.27 Explore selling a product user journey
- 1.28 Explore administration support user journey

2.0 Analysis

- 2.1 Refine and translate KiwiSaver user journey into finappster
- 2.2 Refine and translate selling a product user journey into finappster
- 2.3 Refine and translate admin support user journey into finappster
- 2.4 Project Purpose refinement
- 2.5 Project Objective refinement
- 2.6 Merge of user journeys and discussion
- 2.7 Discussion of merged journeys with client to refine further
- 2.8 Update Risk Register
- 2.9 Update Issue Register
- 2.10 Research and understanding on previous finappster teams work and how it fits in with finappster Sigma's scope
- 2.11 Feedback and meeting with finappster tau

3.0 Design

3.1 Build sequence diagram to cover design aspects of finappster Sigma and future teams (Investor, Investment Provider, Admin Support overall pathways without too many specifics)

3.2 Build more in-depth sequence diagrams to cover specific development design scope for finappster Sigma (Investor user focus, detailed quiz design and design of interface to get user's preferred values matched with similar investments available in the market based off quiz results)

3.3 Figma wireframes of currently understood expected development scope of finappster Sigma

3.4 Discussion and feedback with client on designs/wireframes

3.5 Adjustments made to diagrams based on client and family/friend feedback on development scope design

3.6 Consensus reached on development scope with client

3.7 User story construction with client on Trello

3.8 User story refinement, acceptance test development

3.9 User story confirmation with client, Sprint 1 goal, user story load established

3.10 Planning poker, assignment of user stories to dev team members

3.11 Final proposal refinement, signoff from client/mentor, preparation for development

4.0 Implementation

4.1 React, Machine Learning, Django upskilling

4.2 Development of features in Sprint 1 (Must have features being short and long quiz design based off SDG data that is input into a database, adding the data in a 5P format in the database, and then fetching and the display of this data. Also incorporating the 17 SDG data of user's existing investments/funds in an existing database implemented by finappster tau into the finappster front-end, separated by type of investment).

4.3 Testing of must have features in Sprint 1, first between finappster Sigma team members, then through the client before being moved to the definition of done.

4.4 Development of lower priority features added to Sprint 1 backlog. Includes dashboard 5P GUI development, KiwiSaver help page implementation and FAQ improvement.

4.5 Same testing procedures as 4.3.

4.6 Mid project review documentation preparation

4.7 Mid project review presentation (somewhere this week)

4.8 Sprint 1 end client meeting, sprint 2 discussion

4.9 Sprint 1 retrospective meeting

4.10 Short break before development resumes over summer holidays

4.11 Further React, Machine Learning, Django upskilling (if needed)

4.12 Development of features in Sprint 2 (Must have features being the recommender system that will compare values of the 5Ps for funds/investments in the database to that of the user's personal 5P data and displaying them based on similarity descending, editing, and connecting the existing finappster screens to incorporate these and the features in sprint 1 into a smooth user-friendly process).

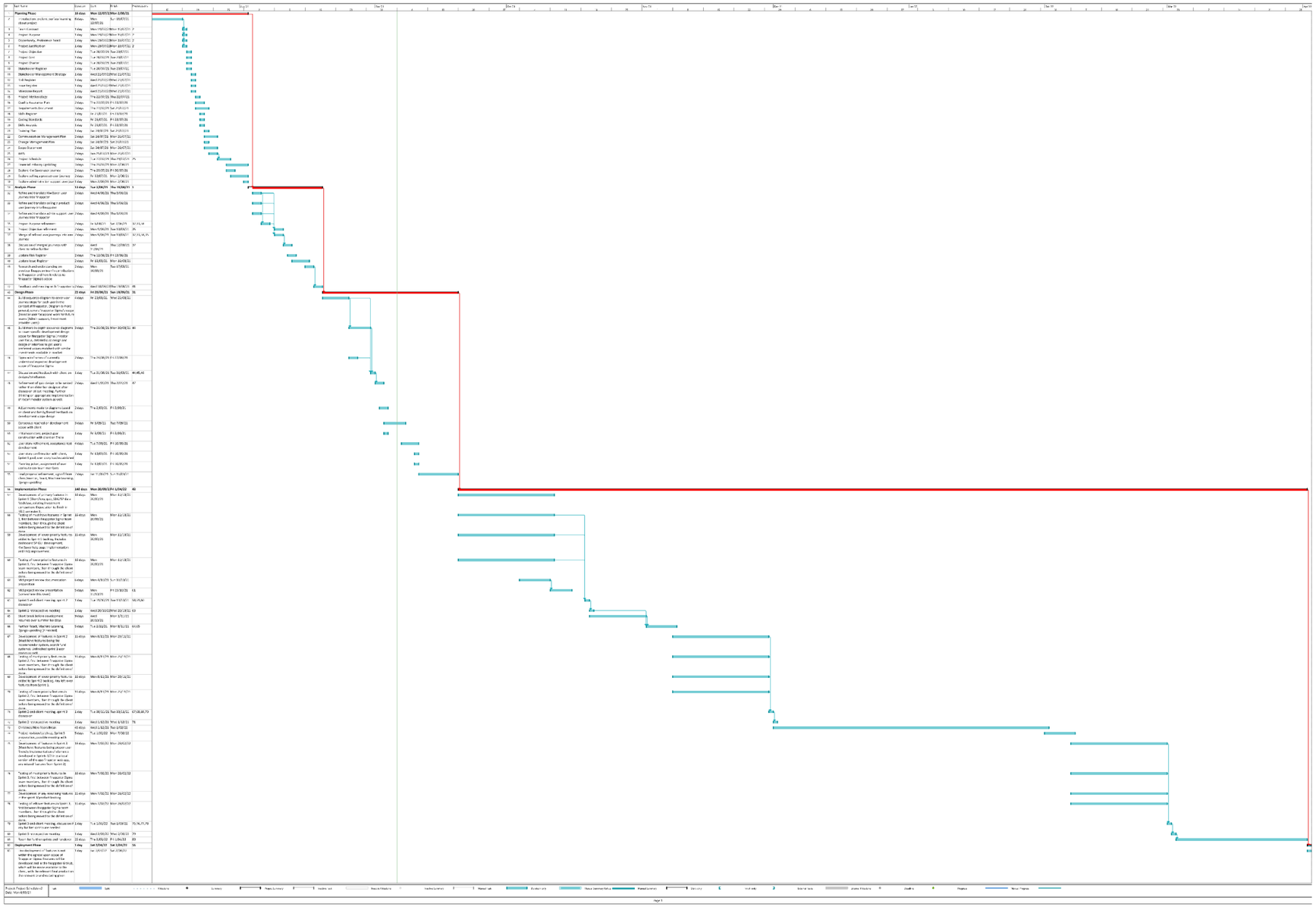
4.13 Same testing procedures as 4.3, but for Sprint 2.

4.14 Development of lower priority features added to Sprint 2 backlog. Any left-over features from Sprint 1.
4.15 Same testing procedures as 4.3, but for Sprint 2.
4.16 Sprint 2 end client meeting, sprint 3 discussion
4.17 Sprint 2 retrospective meeting
4.18 Christmas/New Year's Break
4.19 Project revision/catch up, Sprint 3 preparation, possible meeting with client
4.20 Development of features in Sprint 3 (Must have features being proper user friendly implementation of elements developed in Sprints 1/2 into a local version of the app.finapster web app, any missed features from Sprint 2)
4.21 Testing of must priority features in Sprint 3, first between finappster Sigma team members, then through the client before being moved to the definition of done.
4.22 Development of any remaining features in the sprint 3/product backlog.
4.23 Testing of leftover features in Sprint 3, first between finappster Sigma team members, then through the client before being moved to the definition of done.
4.24 Sprint 3 end client meeting, discussion if any further sprints are needed
4.25 Sprint 3 retrospective meeting
4.26 Room for further sprints and handover

5.0 Deployment

5.1 Live deployment of features is not within the agreed upon scope of finappster Sigma. Features will be developed and in the finappster GitHub, which will be made available to the client, with the relevant final product on the relevant branches being given to the client for future team use.

Project Schedule



Estimated Costs

Our aim is to minimize the cost to the client. Where possible we will use free or subsidized resources. In terms of human resources, the development team are all AUT BCIS students and will be paid with the average salary of a junior software developer. The team mentor will be billed at the cost of one academic hour, for an estimated 300 hours over the course of the project. Mentors' hour will include attending development team meetings, marking draft work, and other requirements that allows the team to function.

Software resources are all setup from previous finappster teams and has provided our team a strong foundation that minimizes costs. We will be utilizing software such as Trello, Discord, GitHub Education, Microsoft Team, Notion, Miro, Figma, and Heroku for hosting databases & website application. All of which are free to use, to help the development team progress the project.

DESCRIPTION	QUANTITY	COST	TOTAL
Team Mentor	300	$165	$49,500
Junior Software Developer	300	$45	$54,000
Client	300	$0	$0
Sub Total			$76,500*
Total incl. GST			$76,511.475

**As the Mentor costs are covered by AUT and the rest of the team are students, there is no cost to the client.*

Assumptions

Our human resource cost estimation is purely speculative and based on the information made available to us through the lectures.

Upskilling Plan

For the scope of our project, our team has identified areas in our knowledge that needs attention to be able to deliver the project efficiently and without delays during times of development. This document's purpose is to identify the appropriate training strategies and activities required to achieve the desired learning outcome during the implementation of the scope of our project.
As our project involves our team being able to implement a quiz with a recommendation engine based on their values and where it ranks in the 5P's, designing and possibly prototyping adding the investment provider as a user to our website, our current training plan will be based of the requirements gathered through all workshops and meetings thus far.

Objectives

To be an effective training plan, our team should meet the following objectives:

- Have knowledge in investment providers, investment funds, schemes, and general finances to have a better understanding at what finappster is trying to achieve and get a shared understanding with our client.
- Since we are working in tandem with finappster tau, our team must understand their work and what they can deliver as most of our project is reliant on the data that they may be able to produce.
- Study the architecture of the existing code to help us plan out how to integrate our prototype within in
- Ensure an appropriate level of skill is reached to perform our roles

Method

Our training plan will involve the following procedures:

- Reverse engineering existing code
- Using online resources for checking code documentation and tutorials
- Writing small test codes to practice our knowledge before proceeding with the project plan
- Asking our mentor and/or our client for anything we're unsure about.

After analysing the each of our strengths and weaknesses in our skills analysis and identifying which technologies we need to learn to accomplish our project, it is crucial that we follow out the above stated procedures before we start the first sprint or before our development phase in our project plan to develop each user story efficiently and mitigate making mistakes or delaying the project.

Stakeholder Register for *finappster Sigma*

Name	Position	Internal/External	Project Role	Contact Information
Chris Stehlin	Team member	Internal	Team Member	prq5006@autuni.ac.nz
John Sangalang	Team member	Internal	Team Member	jsj6212@autuni.ac.nz
Jose Santos	Team member	Internal	Team Member	sff4900@autuni.ac.nz
Pete Scandle	Team Member	Internal	Team Member	vzp7444@autuni.ac.nz
Badger Dowdeswell	Mentor	Internal	Mentor	barry.dowdeswell@aut.ac.nz
Ramesh Lal	Lecturer	External	Paper Leader	ramesh.lal@aut.ac.nz
Leeanna Kohn-Hardy	Client	External	Project Sponsor	leeanna.kohn-hardy@finappster.co.nz
Investors	User	External	User	-
Investment Providers	User	External	User	-
Admin Support	User	External	User	-
finappster tau	Concurrent finappster team	Internal	Developer	-