Project Title: Daily Activity Tracker MVP for Financial Advisors

Client: Old Mutual
Prepared By: NetworkCo
Date: 16 July 2025
Version: 1.0

1. Project Overview

The Daily Activity Tracker MVP aims to provide financial advisors at Old Mutual with a streamlined digital platform to record, manage, and review their daily operational activities. The goal is to ensure that each advisor meets weekly targets through structured planning, appointment scheduling, call tracking, and outcome reporting.

This MVP supports operational efficiency, real-time monitoring, and improved accountability through secure, mobile-accessible technology.

2. Key Features of the MVP

2.1 User Management

- User account creation and secure login

- Role-based access: Advisor, Manager

2.2 Daily Tracker

- Input field for plans of the day

- Record number of calls made

- Log appointments including:

    - Client name

    - Time and location

    - Outcome (Met, Rescheduled, Cancelled)

    - Notes

- Daily submission summary

2.3 Dashboard & Reports

- Daily and weekly performance overview

- KPIs: Calls made, Appointments set, Outcomes achieved

- Download/export functionality (CSV, PDF - optional post-MVP)

2.4 Notifications

- Automated reminders for daily entry

- Alerts for low activity or missed entries

3. Technology Stack

Layer	Technology
Frontend (UI)	React.js
Backend API	.NET Core REST API
Authentication	Supabase Auth
Database	Supabase PostgreSQL
Hosting (MVP)	Vercel (Frontend), Railway or Azure (.NET API), Supabase (Data & Auth)

4. Data Model (Simplified)

Users

- id
- name
- email
- role (advisor, manager)
- team_id (optional)

DailyActivities

- id
- user_id
- date
- plan_for_day
- calls_made
- summary_notes

Appointments

- id
- activity_id
- client_name
- time
- location

- outcome (met, missed, rescheduled)
- notes

5. Project Timeline (4 Weeks)

Week Milestones

1	Finalize requirements, UI wireframes, DB schema

2	Develop UI components and backend API

3	Implement authentication, connect frontend/backend

4	Testing, bug fixes, deployment of MVP

6. Deliverables

- React-based web UI with login and dashboard
- REST API (.NET Core) connected to Supabase
- Supabase-authenticated database with users and activity tables
- Deployment to staging environment
- Admin and user documentation

7. Risks and Mitigation

Risk	Probability	Impact	Mitigation
Stakeholder input delays	Medium	High	Schedule regular check-ins
Integration complexity	High	High	Early testing and modular design
Scope creep	Medium	Medium	Enforce change control procedures

8. Compliance and Security

- POPIA and GDPR compliance for data protection
- Encrypted user data and secure login mechanisms
- Role-based access control for users

9. Approvals

Name	Position	Date
[Old Mutual Rep]	Project Sponsor	[To be filled]
[NetworkCo Rep]	Project Lead	[To be filled]

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