

**Background Information**

<b>Project Name</b>	Fidelity Product Enhancement Project
<b>Team</b>	CSCI 401 Engineers: (1) David Michelson, (2) Joann Lin, (3) Nico Filip-Sanchez, (4) Ryan To, (5) Soren Craig
<b>Stakeholder</b>	Andrew Morgan, Systems Analyst
<b>Objective</b>	Fidelity would like to better understand millennial insights on spending, financial literacy, and social media interaction to better market its products and services.
<b>Key Outcomes</b>	(1) Working MVP/proof-of-concept iOS app to increase millennial engagement with Fidelity by end of semester. (2) Andrew's approval on Deliverables 1-7 to Professor Miller

**Why are we making this?**

Our hypothesis is that millennials are scared of trusting companies like Fidelity with their money due to lack of financial literacy. To address this, we are creating a fun, gamified finance learning iOS app to (1) break down the literacy barrier, and (2) generate interest and trust in Fidelity.

**High level iOS app features: What are we making?**

Below are the "Must Have" features that we plan to implement by the end of this project, as well as features that would be "Nice to Have." Nice-to-haves can be built if we find ourselves with extra time, and they can act as a backlog for anyone that picks up the project in the future.

Must Have (MVP / Proof of Concept)	Nice to Have
<ul style="list-style-type: none"> <li>• <b>Gamification</b> - Users will be able to play fun daily quizzes/games from our own financial curriculum improve their financial literacy</li> <li>• <b>Rewards</b> - Users will be able to gain in-app rewards for completing quizzes/games</li> <li>• <b>Notifications</b> - Users will be reminded through notifications to keep them consistently learning</li> <li>• <b>Authentication</b> - Users will be able to authenticate their accounts through Facebook or other social media sites</li> </ul>	<ul style="list-style-type: none"> <li>• Users can share their success to Facebook to increase virality</li> <li>• Users can to invest their in game currency with Fidelity index fund models to further learn how their money can grow</li> <li>• Users can invest their coins into a Fidelity Portfolio simulator to watch their money grow</li> <li>• Users have a detailed profile with personal statistics</li> <li>• Users can see a leaderboard and compare their earnings</li> </ul>

**See Page 2 for these features broken down into a timeline of deliverables.**

## Deliverables Timeline

Deliverable	Description
<b>Deliverable 1 (This)</b>	- <b>Design:</b> One-page scope letter. Once approved, we can move forward with Deliverables 2-7.
<b>Deliverable 2 (Feb 4)</b>	- <b>Development:</b> Set up development environment (e.g. XCode, Apple ID, GitHub repository, backend database) - <b>Design:</b> Preliminary sketches for must-have features and user flows - <b>Product:</b> Create one example quiz / game for financial curriculum - <b>Product:</b> Decide on name of application
<b>Deliverable 3 (Feb 18)</b>	- <b>Development:</b> Connect iOS app to game database (e.g. questions, answers, etc.) - <b>Design:</b> Hi-def mockups of must-have features/user flows to speed up dev - <b>Product:</b> Create 2 more quizzes / games for financial curriculum
<b>Deliverable 4 (Mar 4)</b>	- <b>Development:</b> Start coding trivia test flow - <b>Product:</b> Finalize financial curriculum - <b>Product:</b> Start forming questions from financial curriculum
<b>Deliverable 5 (Mar 18)</b>	- <b>Development:</b> Start adding user authentication through Facebook; Continue development work from previous weeks - <b>Product:</b> Assess time to develop extra “nice to have” features, and begin dev for highest priority features we have time for
<b>Deliverable 6 (Apr 1)</b>	- <b>Development:</b> Start adding in-game coin reward system and push notifications; Continue development work from previous weeks
<b>Deliverable 7 (Apr 15)</b>	- <b>Development:</b> Finalize must have features and fix any bugs - <b>Product:</b> Complete documentation