Sprint Review Notes

Sprint Goal

Deliver adaptive questionnaire UI, scoring model, and API-ready suitability logic

Date / Sprint Number

Sprint 3 - March 2025

Completed Stories

- Risk Profiling Questionnaire UI
- Risk Scoring Algorithm
- Basic Suitability Ruleset
- API Endpoints for Risk Profile submission

Demo Summary

Walkthrough of questionnaire UI, submission workflow, and real-time product filtering based on client profile.

Feedback from Stakeholders

- Positive feedback on compliance audit trail
- UI improvement suggestions for mobile responsiveness

Incomplete Items / Reasons

- Advanced suitability rules for edge cases (pending due to dependency on regulatory inputs)
- Mobile-specific UI optimizations (pending due to time constraints in Sprint 3)

Business Impact

- Enhanced accuracy of client profiling improves trust
- Compliance audit trail increases regulatory confidence
- Early availability of APIs accelerates integration with wealth management platforms

Next Steps

- Implement mobile UI feedback for responsiveness
- Extend suitability rules for edge cases
- Prepare testing framework for API scalability and performance