Product Roadmap

Timeline (Quarterly/Monthly)

Q1: Design and develop Risk Profiling Questionnaire Engine
Q2: Implement Scoring Model and Suitability Ruleset
Q3: Develop UI/UX, API integration with CRM and Product Catalog
Q4: Build Reporting & Monitoring modules, finalize security & compliance audits

Major Features / Epics

- Epic 1: Design and Develop Risk Profiling Questionnaire
- Epic 2: Implement Risk Scoring Algorithm
- Epic 3: Suitability Engine Logic
- Epic 4: API Development and Integration
- Epic 5: UI/UX for Advisors and Clients
- Epic 6: Security, Compliance, and Audit Trail
- Epic 7: Reporting and Dashboard

Milestones

- Completion of dynamic questionnaire engine
- Scoring logic and investor profile mapping operational
- API-ready suitability engine integration complete
- Advisor & client-facing UI/UX rollout
- Compliance-certified audit trail module delivered
- Reporting dashboards operational

Themes (optional)

- Compliance and regulatory alignment
- Automation and efficiency
- Advisor and client trust through transparency
- Scalability and integration readiness

Dependencies

- Dependency on timely input from investment specialists for questionnaire design
- Integration dependency with CRM and product catalog
- Dependency on regulatory stability for requirements
- Coordination with UI/UX teams for timely delivery

Releases

- Release 1: Questionnaire and scoring engine
- Release 2: Suitability ruleset and API integration
- Release 3: Advisor/Client UI and compliance audit trail
- Release 4: Reporting dashboards and monitoring tools

Owner / Team

- Product Owner: Leads vision and roadmap execution
- Development Team: Builds questionnaire, scoring, API, and reporting modules
- Compliance Team: Ensures regulatory adherence
- UI/UX Designers: Deliver advisor and client interfaces
- QA & Testing Team: Validate functionality, performance, and compliance