Beta Presentation
Rally OKR

The Capstone Experience
Team Quicken Loans

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Project Overview

• Create and track Objectives and Key Results
• Accessible web app for all employees
• Integrate with employee database
• Interface with mobile layout
System Architecture
User View
Hierarchy View

[OKR Hierarchy View Image]

- Increase market share by 10%
- Take on 2000 New Clients
- Increase Employee Productivity
- Improve Agile Development
- Start SCRUM Planning
- Learn Github
- Improve Employee Wellbeing

The Capstone Experience

Team Quicken Loans Beta Presentation
Objective Detailed View

Facilitate New Client Connections

Deadline: 10/15/2020
Opened: 10/14/2020
Visibility: Active
Business Area: Unassigned
Owner: Megan McCarty
Email Owner:

Description
In order to continually grow, we must be constantly bringing in new clients and communicating.

Key Results

<table>
<thead>
<tr>
<th>Key Result</th>
<th>Deadline</th>
<th>Health</th>
<th>Grade</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get new connections</td>
<td>10/2/2020</td>
<td>At Risk</td>
<td>5</td>
<td>10%</td>
</tr>
<tr>
<td>Increase customer outreach</td>
<td>10/14/2020</td>
<td>On Track</td>
<td>N/A</td>
<td>80%</td>
</tr>
</tbody>
</table>
### Key Result Detailed View

**Get 100 new clients**

**Deadline:** 10/3/2020  
**Created:** 8/2/2020  
**Business Area:** unassigned  
**Assignee(s):** Chester Franzen, Tony Sulfaro, Abi Venkat

**Description**

Need to acquire new clients to test our new product.

<table>
<thead>
<tr>
<th>Grades</th>
<th>Feedback</th>
<th>Date</th>
<th>Grader</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>here is my feedback</td>
<td>11/10/2020, 8:10:26 PM</td>
<td>Chester Franzen</td>
<td>Team Member</td>
</tr>
<tr>
<td>6</td>
<td>here is my updated feedback</td>
<td>11/5/2020, 5:23:09 PM</td>
<td>Tony Sulfaro</td>
<td>Shepherd</td>
</tr>
<tr>
<td>9</td>
<td>I thought we did a good job on this KR</td>
<td>11/11/2020, 7:47:09 AM</td>
<td>Abi Venkat</td>
<td>Shepherd</td>
</tr>
</tbody>
</table>
What’s left to do?

• UI/UX updates
  ▪ Update status bar for readability
  ▪ Form validation
  ▪ Consistency among components

• Optimization
  ▪ More efficient API calls

• Improve documentation within source code