

## 1. Project Background and Description

### Overview

The Fast Track Associates (FTA) App is designed to streamline the data entry process for Spine sales reps involved in the Fast Track program. Previously, data tracking was manual, recorded in Excel sheets, resulting in infrequent updates. The FTA App aims to digitize and centralize this process, providing real-time insights to sales leadership.

## 2. Project Scope

### In Scope

- Addition of "Fast Track Associate" category in Sales Rep Setup.
- Development of the FTA App for data entry by Fast Track Associates and mentors.
- Implementation of a Power BI dashboard for reporting to sales leadership.

### Out of Scope

- Non-Spine systems, associates, and Fast Track Associates.
- Non-Spine associates and associates not part of the Fast Track program.

## 3. High-Level Requirements

- Addition of "Fast Track Associate" in Sales Rep Setup.
- Inclusion of "Promotion Date" in Sales Rep Setup.
- Development of the FTA App for data collection.
- Creation of a Power BI dashboard for reporting.

## 4. Deliverables

- FTA App for data entry by Fast Track Associates and mentors.
- Power BI dashboard providing insights into entered data.

### Functional Requirements:

#### 1. Sales Rep Setup Enhancements:

- Addition of "Fast Track Associate" designation and "Promotion Date" fields in Globus One:
- This entails modifying the existing Sales Rep Setup interface within Globus One to include new fields specifically tailored for Fast Track Associates. These enhancements will allow for proper categorization and tracking of FTAs within the system.

#### 2. Application Development:

*Interface for FTAs:*

Ability to record Clinical Experiences, Training, Selling Activities, Administrative Activities, and provide Feedback:

- The application should provide intuitive screens for FTAs to input various aspects of their training and activities, including clinical experiences, training sessions attended, selling activities performed, administrative tasks completed, and feedback received.

#### ***Interface for Mentors:***

Ability to provide feedback on FTAs:

- The application should offer a separate interface for mentors to provide feedback on the progress and performance of the FTAs they are mentoring. This interface should enable mentors to offer constructive feedback based on predefined criteria.

### **3. Power BI Dashboard:**

- Real-time reporting on FTA progress, inclusive of mentor insights:
- The Power BI dashboard should be capable of aggregating and analyzing data entered by FTAs and mentors in real-time. It should provide comprehensive insights into FTA progress, including performance metrics and feedback from mentors.

### **Non-Functional Requirements:**

#### ***1. Performance:***

- App should handle real-time data input efficiently:
- The application should be optimized to handle concurrent data input from multiple users without experiencing performance degradation. This includes efficient data processing and storage mechanisms to ensure responsiveness.

#### ***2. Usability:***

- Intuitive interface for easy navigation:
- The application should feature a user-friendly interface with clear navigation paths and intuitive controls. This ensures that FTAs and mentors can easily access and utilize the various features and functionalities without encountering usability issues.

#### ***3. Security:***

- Data encryption and user authentication mechanisms:
- The application should implement robust security measures to protect sensitive data entered by FTAs and mentors. This includes encryption of data transmission and storage, as well as implementing secure user authentication mechanisms to prevent unauthorized access.

### **Technical Requirements:**

#### ***1. Hardware:***

- Compatible with standard devices used by FTAs and mentors:

- The application should be designed to run smoothly on commonly used devices such as smartphones, tablets, and laptops, ensuring compatibility and accessibility for FTAs and mentors.

## *2. Software:*

- Developed using appropriate programming languages and frameworks:
- The application should be developed using suitable programming languages and frameworks that support the required features and functionalities. This ensures scalability, maintainability, and future-proofing of the application.

## *3. Integration:*

- Integration with Globus One for Sales Rep Setup enhancements:
- The application should seamlessly integrate with the existing Globus One system to facilitate the enhancement of Sales Rep Setup functionalities. This integration ensures data consistency and accuracy across systems.

## **Assumptions and Constraints:**

### *1. Assumption:*

- FTAs and mentors will have access to the app via their devices:
- It is assumed that FTAs and mentors will have access to compatible devices with internet connectivity to utilize the application effectively.

### *2. Constraint:*

Development limited to Spine division and FTAs only:

- The development scope of the application is limited to the Spine division and specifically targeted towards Fast Track Associates. Any functionalities or features beyond this scope are considered out of scope for this project.

## **Dependencies:**

- Dependency on Globus One for Sales Rep Setup enhancements:
- The development and implementation of Sales Rep Setup enhancements within the application rely on the availability and cooperation of the Globus One system. Any changes or updates to Globus One may impact the development timeline and functionality of the application.

## **Risk Analysis:**

- Risks include potential technical challenges during development and user adoption:
- Potential technical challenges during development, such as integration issues or compatibility issues with existing systems, could impact the project timeline and deliverables. Additionally, user adoption may pose a risk if FTAs and mentors encounter difficulties in using the application effectively, highlighting the importance of user training and support strategies.

## BASIC FLOW

This section outlines the primary navigation flow within the Fast Track Associates (FTA) application, providing a structured approach to accessing and recording various activities.

### General Navigation of Training Record Entry

Fast Track Associates are guided through the process of recording their training activities in a streamlined manner.

#### 1. Main Screen Navigation:

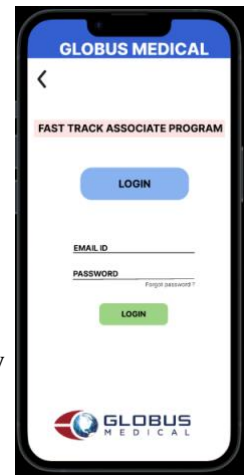
- Fast Track Associates access the main screen, which categorizes different activities for easy navigation.

#### 2. Selection of "Training":

- From the main screen, users select the "Training" option from the "Record activity" menu.

#### 3. Training Record Entry:

- Users can add training records by selecting the appropriate training from a dropdown menu.
- Additionally, they provide scores and ranks relevant to the training activity.



### General Navigation of Clinical Experience Record Entry

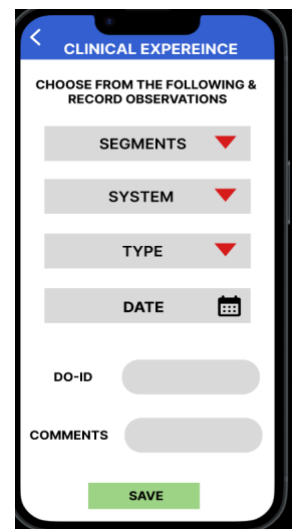
This subsection details the steps involved in recording clinical experiences within the FTA application.

#### 1. Selection of "Clinical Experience":

- Fast Track Associates navigate to the "Clinical Experience" section from the "Record activity" menu.

#### 2. Dropdown Menu Navigation:

- Dropdown menus display categories and sub-categories related to clinical experiences,



facilitating easy selection.

### 3. Data Capture:

- Users capture detailed information about their clinical experiences within the provided fields.

A screenshot of a mobile application interface for recording training observations. The title bar is blue with a back arrow and the word 'TRAINING'. Below the title bar, the text 'CHOOSE FROM THE FOLLOWING & RECORD OBSERVATIONS' is displayed. The form contains several input fields: a dropdown menu for 'TRAINING', a date picker for 'DATE', a text input for 'SCORE', a text input for 'RANK', and a text input for 'COMMENTS'. A green 'SAVE' button is located at the bottom of the form.

## General Navigation of Selling Activities Record Entry

The process of recording selling activities is described in this section, ensuring efficient data entry

### 1. Selection of "Selling Activities":

- Users access the "Selling Activities" section from the main menu.

### 2. Activity Addition:

- Fast Track Associates can add new selling activities by specifying the type and date.
- They also have the option to include additional comments for clarity.

A screenshot of a mobile application interface for recording selling activities. The title bar is blue with a back arrow and the words 'SELLING ACTIVITIES'. Below the title bar, the text 'CHOOSE FROM THE FOLLOWING & RECORD ACTIVITY' is displayed. The form contains several input fields: a dropdown menu for 'ACTIVITY', a dropdown menu for 'TYPE', a date picker for 'DATE', and a text input for 'COMMENTS'. A green 'SAVE' button is located at the bottom of the form.

## General Navigation Administrative Activities Record Entry

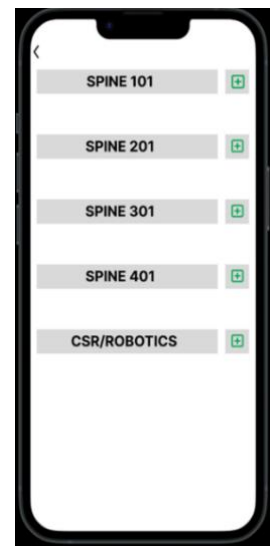
This subsection outlines the steps involved in recording administrative activities within the FTA application.

### 1. Selection of "Administrative Activities":

- Users navigate to the "Administrative Activities" section from the main menu.

### 2. Activity Addition:

A screenshot of a mobile application interface for recording administrative activities. The title bar is blue with a back arrow and the words 'ADMINISTRATIVE ACTIVITIES'. Below the title bar, the text 'SELECT THE FINISHED ACTIVITY & UPDATE RECORDS' is displayed. The form contains several input fields: a dropdown menu for 'ACTIVITY', a date picker for 'DATE', and a text input for 'COMMENTS'. A green 'SAVE' button is located at the bottom of the form.



-Fast Track Associates add new administrative activities by selecting the activity and date from the provided options.

- Comments can be added to provide additional context or details.

| SEGMENT            | SYSTEM    | O | S | P |
|--------------------|-----------|---|---|---|
| ANTERIOR CERVICAL  | COALITION | 2 | 1 | 1 |
| POSTERIOR CERVICAL | ELLIPSE   | 5 | 2 | 1 |
| ANTERIOR CERVICAL  | AGX       | 4 | 1 | 1 |
| ALIF               | MONUMENT  | 2 | 0 | 2 |

## General Navigation of Feedback Entry Screen

This section describes the process of providing feedback within the FTA application.

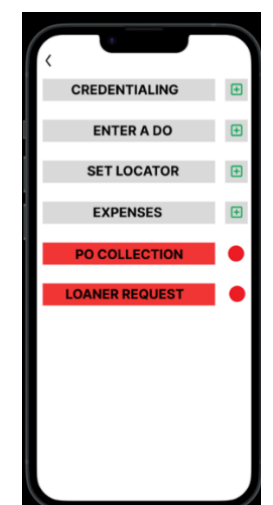
### 1. Selection of "Feedback":

- Users access the "Feedback" section from the main menu.

### 2. Cadence Requirement:

- Feedback submission is required at a 3-month cadence to ensure regular assessment and improvement.

### 3. Anonymity Assurance:



- Feedback is provided through dropdown selections, ensuring anonymity upon submission.

**HELP US IMPROVE**

DID MY MENTOR COVER ALL THE TOPICS FROM THE ROADMAP OF MY CURRENT PHASE?

DOES MY MENTOR HELP ME DIVERSIFY MY CLINICAL EXPERIENCE?

DOES MY MENTOR HELP ME REACH MY CLINICAL EXPERIENCE EXPECTATIONS?

**SUBMIT**

\*YOUR FEEDBACK WILL REMAIN ANONYMOUS

**FEEDBACK FORM**

ANSWER IN %  
0-25% | 26-50% | 51-75% | 76-100%

1. DOES MY FTA WORK INDEPENDENTLY? ORDER IN & RETURN LOANERS? SET UPS CASES? ETC

2. DOES MY RESPONDS PROMPTLY TO CALLS & TEXTS?

3. DOES MY FTA TAKE TRAUMA CALL?

4. HAS MY FTA SHOWN A GENUINE DESIRE TO IMPROVE & TAKE COACHING?

5. DOES MY FTA SHOW A CURIOSITY TO LEARN MORE ABOUT SPINE & OUR INDUSTRY?

## General Navigation of Report Card Screen

Users can access detailed reports within the FTA application for comprehensive insights into their activities.

### 1. Selection of "Report":

- Users navigate to the "Report" section from the main menu.

### 2. Activity Cataloging:

- The main screen catalogs activities in various categories, including Training, Clinical Experience, Selling Activities, and Administrative Activities.

### 3. Detailed Report Viewing:

- Users can select a specific category to view detailed reports and performance metrics.

**FTA 1: DEVON BAILEY**

LAST FEEDBACK: 02/11/2023  
LAST TRAINING: 01/20/2023  
TOTAL PROCEDURES: 11  
TOTAL SELLING ACTIVITIES: 5  
TOTAL ADMIN ACTIVITIES: 7

**REPORT** **FEEDBACK**

\*NEXT FEEDBACK IN 45 DAYS

**FTA 2: BRIAN JONES**

LAST FEEDBACK: 09/11/2022  
LAST TRAINING: 12/01/2022  
TOTAL PROCEDURES: 15  
TOTAL SELLING ACTIVITIES: 11  
TOTAL ADMIN ACTIVITIES: 7

**REPORT** **FEEDBACK**

\*FEEDBACK PAST DUE 5 DAYS

**FTA 1: DEVON BAILEY**

LAST FEEDBACK: 02/11/2023  
LAST TRAINING: 01/20/2023  
TOTAL PROCEDURES: 11  
TOTAL SELLING ACTIVITIES: 5  
TOTAL ADMIN ACTIVITIES: 7

**REPORT** **FEEDBACK**

TRAINING **K** IN 45 DAYS  
CLINICAL EXP  
SELLING ACTIVITIES  
ADMIN ACTIVITIES  
FEEDBACK

**FTA 2: BRIAN JONES**

LAST FEEDBACK: 09/11/2022  
LAST TRAINING: 12/01/2022  
TOTAL PROCEDURES: 15  
TOTAL SELLING ACTIVITIES: 11  
TOTAL ADMIN ACTIVITIES: 7

**REPORT** **FEEDBACK**

\*FEEDBACK PAST DUE 5 DAYS

## **General Navigation for Mentors**

This section outlines the navigation flow within the FTA application specifically designed for mentors.

### **1. Performance Summary:**

- Mentors access a main screen providing a high-level performance summary of the Fast Track Associates they mentor.

### **2. Report Selection:**

- Dropdown options allow mentors to select reports for specific activities, providing detailed insights.

### **3. Feedback Access:**

- Mentors can access feedback reports and provide new feedback entries as necessary.

### **4. Reminder Functionality:**

- A reminder feature alerts mentors to upcoming feedback timelines, ensuring timely assessments and support for their mentees.