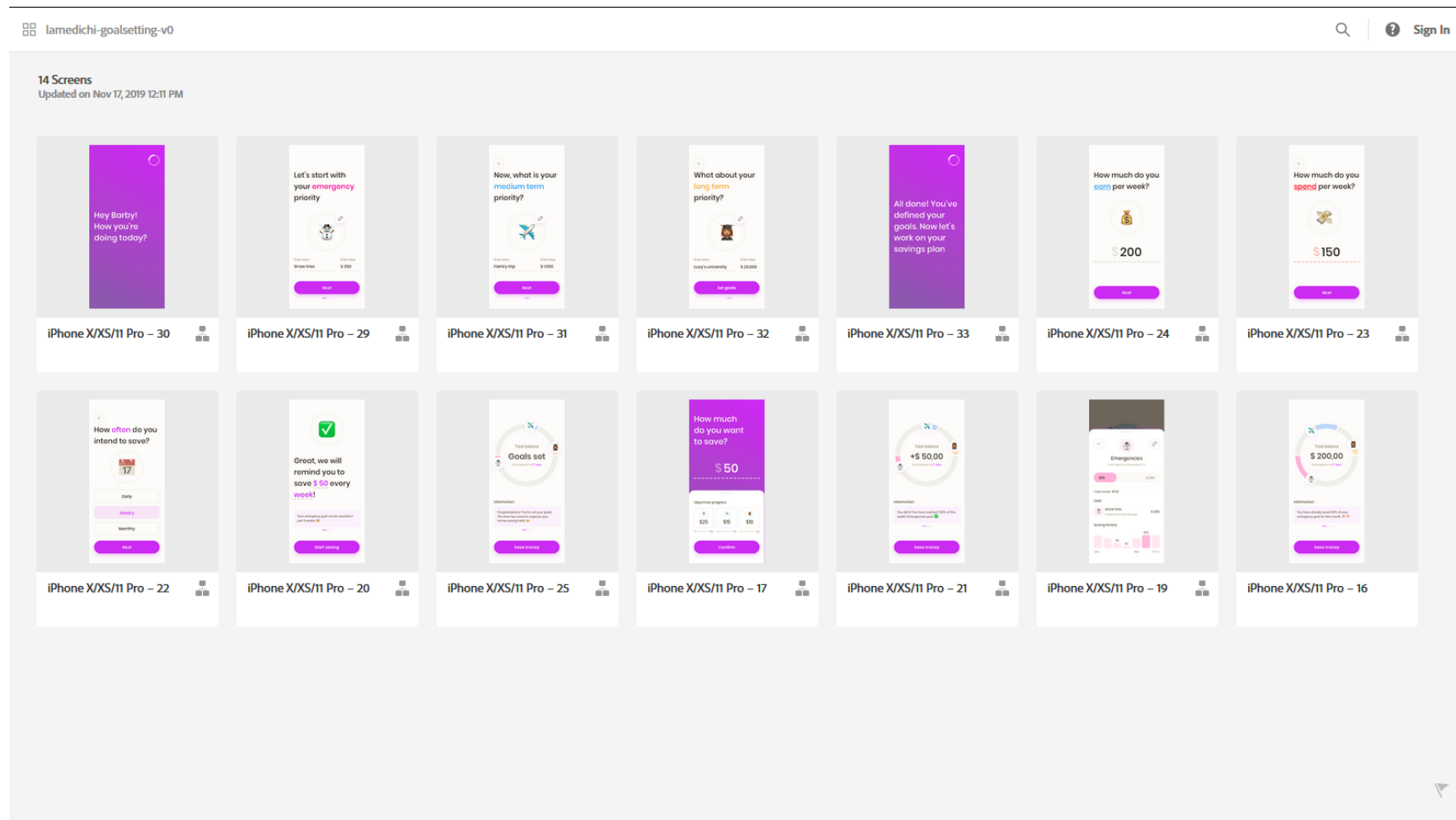


Goal Setting Wireframe Version 1 – Barbara comments

First of all, this is super cool! Congratulations on the great work.

Please take all of my comments in the context of that first sentence.

Note that when I refer to slide numbers, the top row is 1-7 going left to right and the bottom row is 8-14.



Color and Clip Art

1. I would like to stay with the current color palette of LaMedichi, with the purple to blue spectrum.
2. Can we change some of the clip art? Does it need to be clip art? Can I see different choices somewhere?

Slide 1

1. I really like the friendly introduction page.
2. There's a wording mistake but it doesn't matter because we'll need to translate this into Spanish for testing anyway.

Slide 2

1. It's not really an emergency priority. It is "emergency savings". The purpose is in case there is an unexpected expense or an actual emergency. Experts recommend that a person should have enough in their "emergency savings" to cover six months of bills. Other experts have looked at the 'right number' for people with low income and recommend about \$2,500. This is the number that I am recommending. Although I think of buying tires as an emergency, it is really more of a medium-term savings goal. The emergency savings would be more in case there was an accident. I admit that the distinction between the two is not very clear.

So here are my suggested changes:

- a. On top, change "...emergency priority" to "emergency savings"
- b. Fill in the goal name with "emergency savings" and this should not be an editable field
- c. Fill in the goal value as \$2,500, but make this field editable

Slide 3

1. Change to medium-term priorities (plural)
2. People should be able to have more than one so there should be additional fields

Slide 4

1. Change to long-term priorities (plural)
2. People should be able to have more than one so there should be additional fields

Slide 5

1. Fantastic, how quick we got to this stage!
2. Add a “.” (period/full stop) after the last word. Not that it really matters because it needs to be translated into Spanish.

Slide 6

1. We can leave it as it is for now and I will check with people whether the unit of time should be “week”.
2. Is it possible to give the choice of weekly or monthly or is that too confusing?

Slide 7

1. Typically, it is monthly bills. Please change to monthly for now, but I will need to check with people. Same question as in Slide 6, point 2.
2. I’m wondering if we could have a basic calculator on this page, so people could do a rough estimate of their monthly bills.
3. It is somewhat tricky because I’m not sure if we are asking about necessities (rent, utilities, food) or necessities and wants (entertainment, clothes, etc.). I’m not sure if I’m over thinking this and just let people calculate what they and use this as a fun quick tool.
4. It might be nice at some point to have both. For example, this tool could be quick and simple but people could have an option to click and go to a very basic spreadsheet that people could just put in their own numbers and the spreadsheet auto-calculates. This might be something that only works on a computer or a standalone tool that an ambassador could use to help a member.
5. Point 4 is a too complicated for this version of the prototype but we should discuss. I’ll show you my computer when we are on Zoom so you can see what I have in mind.

Slide 8

1. Add twice a month
2. By adding twice a month, we lose the symmetry so how about:
Every day, Every week, Twice a month, Once a month

Slide 9

1. I love how it does the calculation. I suppose that if you have once a week in terms of earning and once a month in terms of expenses, you can program a different calculation to take account of an average of 4.3 weeks per month or you can be more precise for each month such as February or months with 30 days versus 31 days.
2. Re-point 1, the calculation will need to change anyway because a person isn't going to save all of the difference between earnings and spending. For the purpose of this tool, let's use 50% right now.
3. I also love "your emergency goal can be reached in 4 weeks". I feel like this is a little too hidden.

Slide 10

1. I love "next deposit in 7 days". It is nice to think that a person would look at their LaMedichi app every day.
2. I'm not sure exactly how the ring works. Will emergency savings get filled up first? Will a person be able to decide the percentage that goes into each of the three categories? We can talk about this, but I like the design.

Slide 11

1. I like this slide, but I find it a little confusing. In slide 9, we already determined the amount of savings or did we? How does this number relate to the calculation we already did?
2. Is there a reason that you organized it so that the smaller number is on the right rather than the left?

Slide 12

1. I like this slide but I'm not sure it is in sequence or if it is redundant with slide 10?

Slide 13

1. I like everything on this page but maybe it is too much for one page? The top seems to be a summary and the bottom seems to be a savings history. Is it a savings history for everything or just for emergency savings? Anyway, both pieces of information are important but maybe it can be organized better.

Slide 14

1. Great finishing slide. Wondering if it is redundant with slide 10 and slide 12?