

Personal Expense Tracker

**Based on ten customer interviews and observations from the Fairplane Guided City Tours team**

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# Entice

**SCENARIO**

**Browsing, installing, using, and rating a personal tracker app**

How does someone initially become aware of this process?

**Enter**

What do people experience as they begin the process?

**Engage**

In the core moments in the process, what happens?

**Exit**

What do people typically experience

as the process finishes?

**Extend**

What happens after the experience is over?

**Writing & submitting review**

**Prompt for review**

**Steps**

**View single plan**

**Browse available plans**

**Suggesting new plans**

**Plan gets added to user history**

**Recommendations**

**Adding**

**Goals**

**Graphical**

**Visuals**

**Email alerts**

**Email confirmation**

**Confirm payment & plan**

**Complete payment information**

**Start purchase of a plan**

**Visit website or app**

**Hearing about app**

**From friends**

What does the person (or group) typically experience

The customer shares their experiences and gives a rating for the particular plan.

Once the plan is over for a google form is sent to the customer where they can share their experience and their positive and negative experiences.

After viewing different plans offered by the app, a customer clicks on view more of an interested plan to know more about the plan

The customer then sees all available plans according to their needs

Seeing their friends use and benefit from the app people get to know about the app

A customer then installs or browses the app

After deciding to go with a particular plan, they click the Purchase button

They fill out their contact and credit card information, then continue

They see a summary of what they are about to purchase, then they confirm and the plan is added to dashboard

A confirmation email is sent to the customer confirming the fact that they have chosen the plan

All alerts regarding spending expenditure, crossing limits, how much money they have saved are sent as emails to the customer as they might forget about the app.

While using the app customers can see how much they have spent on categories which gives them an overall understanding of where they are spending and how much they are spending

While using a plan a customer can add a goal which they want to achieve and the app will show how far they are from achieving their goal

The app will at times suggest the user of how they can change their their spending habits to reach their goals

Once a user has completed a particular plan offered by the app, the plan moves to the user history of the app.

Once a plan is over the app recommends new plans based on how the customer used their old plans

**Interactions**

“Leave a review” modal window within the profile on the website, iOS app, or Android app

User History.

Post-purchase screens website, iOS app, or Android app

Recommendations span across website, iOS app, or Android app

Completed experiences section of the profile on the website, iOS app, or Android app

Direct interactions with the guide, and potentially other group members

Direct interactions with chatbot for adding goals

Visual Interactions of spending expenditure

Customer's email (software like Outlook or website like Gmail)

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Payment overlay within the website

Plans Available

Plans Available

Chatbot for answering simple queries

What interactions do they have at each step along the way?

**People:** Who do they see or talk to?

**Places:** Where are they?

**Things:** What digital touchpoints or physical objects would they use?

**Goals & motivations**

Help me see ways to enhance my new plan

Help me see what I could be doing next

Help me see what I've done before

Help me spread the word about how this plan made a positive impact on my life

Help me leave the plan with good feelings and no awkwardness

Suggest spending methods in a way that does not demoralize me

Help me feel like I’m progressing towards my goal

Help me understand clearly how my spending habits look like

Help me make sure I don't forget about my plan so that I constantly see how my spending habits are

Help me feel confident that my purchase is finalized and tell me what to do next

Help me feel confident that my plan is finalized and tell me what to do next

Help me get through this payment part without too much hassle

Help me commit to go forward with this plan

Help me understand what this app is all about

Help me see what they have to offer

Help me understand why I need this app

Help me analyze where I’m spending money the most

Help me save my money

At each step, what is a person’s primary goal or motivation? (“Help me...” or “Help me avoid...”)

**Positive moments**

What steps does a typical person find enjoyable, productive, fun, motivating, delightful, or exciting?

It's fun and engaging to see how this app was able to help people make a difference in their lives.

## It's reassuring to read reviews written by past people who have used this particular plan

We think people like these recommendations because they have an extremely high engagement rate

People like looking back on their past plans

Excitement about the plan

("Here we go!")

It makes me feel happy that people

Current payment flow is very bare- bones and simple

We've heard from several people that the reminder emails were essential.

Giving the user a good feeling

When he/she is progressing towards their goal.

## People love the plan itself, we have a 98% satisfaction rating

People generally complete plans feeling content and satisfied

**Negative moments**

What steps does a typical person find frustrating, confusing, angering, costly, or time-consuming?

People don’t know which plan will actually suit them and might choose the wrong plans

Several people expressed "information overload" as they browse

## People express a bit of fear of commitment at this step

Trepidation about the plan

("I hope this will be worth it!")

### People might get demotivated if they are not progressing towards their goal

## Customers report feeling review fatigue

## People describe leaving a review as an arduous process

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is over?