**Development Roadmap (Week 10+)**

**Mingus New User Onboarding: Missing Screens & Processes**

**1. Welcome & Account Creation**

* **Welcome Screen**
* Brand introduction, value proposition, and “Get Started” CTA.
* Option to sign in or create a new account.
* **Account Registration**
* Email, password, and confirm password fields.
* Social sign-in options (Google, Apple, etc.) *(if not present)*.
* Terms of service and privacy policy agreement.
* **Phone Verification**
* Prompt to verify email address.
* Resend verification link and support contact.

**2. Profile Setup**

* **Basic Info Collection**
* Name, age, gender (optional), and preferred pronouns.
* Demographic self-identification (with empowering, optional language).
* **Location & Household**
* Zip code/city, state.
* Household size, dependents, relationship status.
* **Income & Employment**
* Current income range.
* Employment status (employed, self-employed, seeking, student, etc.).
* Industry and job title selection (with NAICS mapping).

**3. Career & Financial Baseline**

* **Career Check-In**
* Self-assessment of job satisfaction, perceived security, and recent changes.
* Option to connect LinkedIn for auto-fill (if supported).
* **Financial Snapshot**
* Monthly income, expenses, and savings.
* Emergency fund status (months of expenses covered).
* Debt overview (optional, with non-stigmatizing language).

**4. Personalization & Goal Setting**

* **Goal Selection**
* Choose primary goals: build emergency fund, career advancement, reduce stress, etc.
* Option to set custom goals.
* **Milestone Planning**
* Prompt to set upcoming milestones (e.g., planned job change, certification, major purchase).
* **Community & Support Preferences**
* Interest in mentorship, networking, or affinity groups.
* Preferred communication channels (email, SMS, app notifications).

**5. Education & Consent**

* **How Mingus Works**
* Brief, visual explanation of job security analysis, cash flow forecasting, and health integration.
* Data privacy and security summary.
* **Consent for Data Use**
* Explicit opt-in for data integrations (e.g., bank, employer, health data).
* Option to skip and connect later.

**6. Initial Insights & Recommendations**

* **First Job Security Score**
* Display initial score with empowering, non-alarmist language.
* Show top awareness factors and career optimization strategies.
* **Emergency Fund & Cash Flow Guidance**
* Personalized emergency fund target.
* Immediate spending and saving recommendations.
* **Health & Relationship Awareness**
* Option to connect health app or answer a brief wellness check-in.
* Relationship health prompt (optional, with privacy emphasis).

**7. Premium Feature Preview & Tier Selection**

* **Feature Comparison Screen**
* Clear, side-by-side comparison of Essentials, Professional, and Executive tiers.
* Highlight premium features (WARN alerts, coaching, networking, advanced analytics).
* **Upgrade Opportunity**
* Contextual prompt to try Professional/Executive free for 7 days.
* Success stories/testimonials from higher-tier users.

**8. App Tour & Next Steps**

* **Guided App Tour**
* Highlight dashboard, job security card, cash flow, and community features.
* “Set up notifications” and “Connect accounts” prompts.
* **Next Steps Checklist**
* Personalized checklist (e.g., complete profile, connect bank, join community event).
* Progress bar and encouragement.

**9. Onboarding Completion & Engagement**

* **Congratulations Screen**
* Celebrate completion, reinforce empowerment and community.
* Invite to first weekly check-in or event.
* **Ongoing Engagement Setup**
* Schedule first check-in reminder.
* Offer to download mobile app (if on web).

**Missing Processes/Integrations**

* **Error Handling & Save Progress:**
* Save progress at each step, allow resume if interrupted.
* **Accessibility & Language Support:**
* Ensure all screens are accessible and inclusive.
* **Analytics & Feedback:**
* Track onboarding drop-off, collect feedback at key points.
* **Referral/Invite Flow:**
* Option to invite friends or colleagues for community growth.

**Summary Table: Missing Screens**

| **Step** | **Screen/Process Name** | **Key Features/Notes** |
| --- | --- | --- |
| 1. Welcome | Welcome, Registration, Verification | Brand, sign-in, TOS, email verify |
| 2. Profile Setup | Basic Info, Location, Income | Demographic, household, job, income |
| 3. Baseline | Career Check-In, Financial Snapshot | Job security, cash flow, debt |
| 4. Personalization | Goal Setting, Milestones, Community | Goals, milestones, support preferences |
| 5. Education & Consent | How It Works, Data Consent | Visuals, privacy, opt-in |
| 6. Initial Insights | First Score, Recommendations | Empowering language, actionable steps |
| 7. Premium Preview | Tier Comparison, Upgrade Prompt | Feature gating, testimonials, trial offer |
| 8. App Tour | Guided Tour, Next Steps Checklist | Feature highlights, progress bar |
| 9. Completion | Congratulations, Engagement Setup | Celebrate, reminders, app download |

**Implementing these screens and processes will ensure a complete, empowering, and conversion-optimized onboarding flow for Mingus.**Let me know if you want wireframes, user stories, or a prioritized implementation plan!