## *A1 Client Interview Transcript:*

### Date: 19/09/2023

### Mode of Interview: Physical

**Interviewer**: Hi Mr. Hari, thank you for taking the time to meet with me today as we had discussed earlier. I would like to discuss with you to know more about your nature of work and the issues that you are facing.

**Client:** Hi, it's a pleasure to discuss with you.

**Interviewer:** Could you give a background of what responsibilities you have at work?

**Client:** Sure. **I'm a Regional Manager at Store XXX.** I specifically manage the revenue and costs for the stores in this district. Although I have some staff working under me in the finance department, I prefer handling the transactions by myself.

**Interviewer:** Ok sir. What are the responsibilities you have at home?

**Client:** Since I'm the breadwinner of the family, I manage our budgeting and finances. **I have a lot of transactions to handle for my family as well**, my kids' school fees, rent, groceries, loans, and more.

**Interviewer:** Have you faced any issues regarding finance management for your office and home?

**Client:** Yes, I've been having issues with my initial and current method of financial management.

**Interviewer**: Ok sir, could you give me some information about your initial financial management system?

**Client**: Definitely. I used to manage my finances using a combination of **notebooks and paper spreadsheets**. One of the major challenges I faced was the **sheer number of transactions** I had to handle for both my work and family. It was **difficult to keep everything organized and to get a holistic view of my financial health.** Also, this system required a lot of **time, physical space, and energy.** I had to manually write down each income and expense, which is quite time-wasting and made my wrists hurt after a while. Sometimes, **I mixed up my work and personal finances or made some calculation mistakes**, like one day I put one of my office sales data into my personal finance notebook and became a millionaire for a day! What a headache that was! And as for **accessing existing transactions, it was frustrating to have to spend a lot of time take out the folders from my shelf and go through them one-by-one. Editing transactions could take me hours and drain my energy since I had to redo folders upon folders of transactions.** The only plus-point in using this method I can think of was that I could **easily check what recent transactions I made** in my shelf.

**Interviewer**: I'm sorry to hear that sir, your past situation must have been stressful for you. What is your current method in dealing with this issue?

**Client**: I'm **currently using a very large Excel file with multiple sheets** to record my transactions. I am now able to **very quickly and easily make transactions in a few clicks** without having to deal with numerous notebooks and such. But this system has its own list of disadvantages that make it a headache to use. For example, **I can only use it from my home Macbook** so if I have a new work-related transaction to add or calculations to do, I have to wait till I get home since I can't bring my MacBook to the office. And I'm afraid to give my kids my laptop since they may drop it and potentially **corrupt the data, making me lose it forever, or they may open the file and tamper with the data.** I also tried to categorize the transactions by

creating separate sheets for each category and putting the transactions in the respective sheet but I'm **not satisfied by this ad-hoc method at all since it's hard to find previous transactions to edit or delete them.**

**Interviewer**: It seems like your current situation also comes with its share of problems. In your daily life, what devices do you primarily use?

**Client**: Like I said, **at home I use my Macbook** and in the **office I use the company-provided Windows desktop.** But I would like to add that I'm **not very adept with technology**, for example, I'm struggling to make graphs in Excel to be able to see a report of my monthly finances. And also, **I use both a personal Gmail account and an office Gmail account regularly.**

**Interviewer**: I will keep that in mind. Thank you for your time, sir. This information will be invaluable for the planning of the application. I'll get started right away.

**Client**: Thanks. I'm excited to see the progress!