FINAL PRESENTATION

FINANCIAL WELLBEING

HELLO
Welcome to your financial management app!

$croo!

User-Centered Design and Evaluation 2022/2023

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STAGES OF THE PROCESS

RESEARCH

Conduct a research plan to better understand the users

DEFINE

Define the problem, create personas and scenarios that represent the research

IDEATE

Based on the research and the problem identified, ideate solutions

PROTOTYPE

TEST

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FOCUS GROUP AND TASK

Target group: Students (>18 years) + Young Adults
Tasks: Budget Management + Savings Planner

HUNT STATEMENT

We are going to make interviews and surveys to learn about the relationship between students/young working people and savings plan/financial management

RESEARCH PLAN

As a form of qualitative research, we made interviews. Questionnaires using Google Forms and wix were the qualitative research choice.

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INSIGHTS

Insights are our source of triggers that guide the construction of ideas

PERSONNAS

We have created three fictional users/characters: Jeremias, Bianca and Bruno

SCENARIOS/STORY BOARD

It defines when, where and how the story of the persona takes place

CI MODELS

It is basically ongoing cyclical efforts that connects scenarios and define the relations between entities

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JEREMIAS

Age: 21

Job: Student

Challenges: Use of spreadsheets for budgeting

1 GELATO
Jeremias sees a product he likes, in this case, an ice cream

2
He goes inside the store and buys it

3
After buying it, he wants to input the value of the transaction in his budget spreadsheet, however since he only has his phone with him, so it is hard to work with his spreadsheet

4
He then has to input the transaction when he goes home which frustrates him, since he could have already done it, and excel is not very simple to use.

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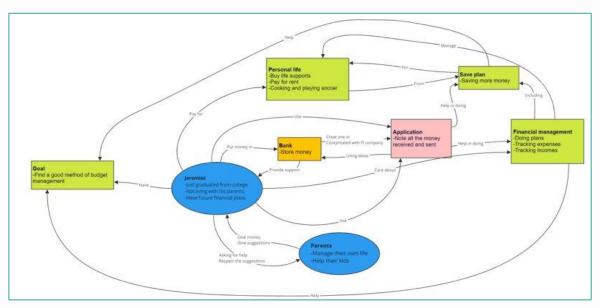Define the problem, create personas and scenarios that represent the research

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ROLE PLAY

Roleplay each persona to know the needs and the opinions of the users

DISCUSSION

Reach a consensus between the personas of the needs and the community space

IDEATE

Reflect on the points defined in discussion and generate new ideas and variations

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JEREMIAS

Age: 21

Job: Student

Challenges: Use of spreadsheets for budgeting

GELATO

OPEN

Jeremias sees a product he likes, in this case, an ice cream

He goes inside the store and buys it with cash.

After buying it, he easily input the value of the transaction in his budget app.

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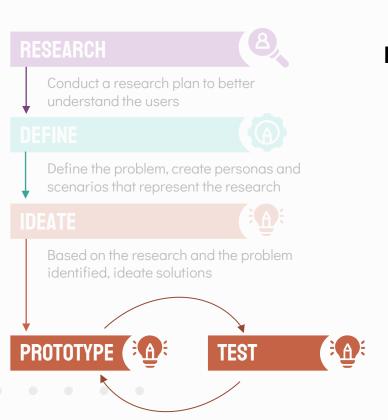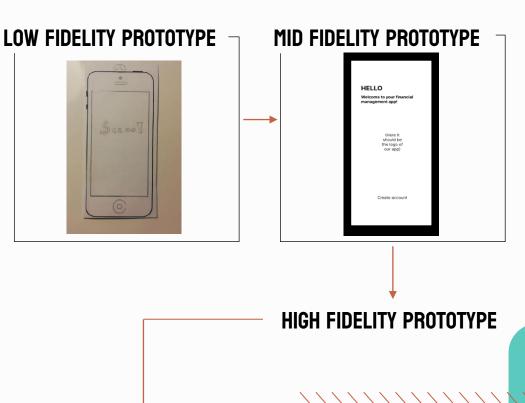Based on the research and the problem identified, ideate solutions

PROTOTYPE

TEST

LOW FIDELITY PROTOTYPE

MID FIDELITY PROTOTYPE

HELLO

Welcome to your financial management app!

(Here it should be the logo of our app)

Create account

HIGH FIDELITY PROTOTYPE

HELLO

Welcome to your financial management app!

$croo!

START

Create account

HIGH FIDELITY PROTOTYPE

HIGH FIDELITY PROTOTYPE

01. TASKS/FEATURES

01. Create an Account

02. Delete the 'Housing' category from expenses

03. Add new expense in 'Food' with the following details:

Description: AEIST
Total Amount: 5,00€ divided with 'Maria Pinto' in 2

04. Change the category of expense created to 'University' expenses

HIGH FIDELITY PROTOTYPE

01.   **TASKS/FEATURES**

05.   Go to investments and learn about 'What are stocks?'

06.   Go to menu and see the bank accounts available

07.   See the info of friend 'Fénix'

08.   Schedule a new payment: Pay the University fee using the Santander account and make the payment through NIB

HIGH FIDELITY PROTOTYPE

02. USER FEEDBACK

Summative Evaluation

EVALUATION

Formative Evaluation

EFFICIENCY

EFFECTIVENESS

SATISFACTION

Figma

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START

Create account

HIGH FIDELITY PROTOTYPE

03. CHANGES

Phone 1:
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START

Create account

Phone 2:
❮ CREATE ACCOUNT

1 — 2 — 3

Choose your way to sign up

Email   Phone number

Enter your phone number:
+351 980 574 736

We have sent a code to your phone number

Please, verify your email and enter the code:
893674

❮ Previous step   ✓

Phone 3:
❮ Schedule Payments

Scheduled Payments 📅

26.01.2023   -2,50€   Maria ❯
08.03.2023   -82,50€   Fenix ❯

+ SCHEDULE NEW PAYMENT

History

✅ Completed Payments ❯
🚫 Denied Payments ❯

Phone 4:
❮ CATEGORIES

Expenses - Housing

02.01.2023   -4.50€   Continente ❯

Are you sure you want to delete this category?

Cancel   ✓

16.04.2022   -12,61€   CASA ❯

next page

+ ADD NEW

🗑

HIGH FIDELITY PROTOTYPE

04. REFINEMENT

PROTOTYPE

TEST

HIGH FIDELITY PROTOTYPE

04.   REFINEMENT

PROTOTYPE   TEST

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