OneBank

Team MakeItRain

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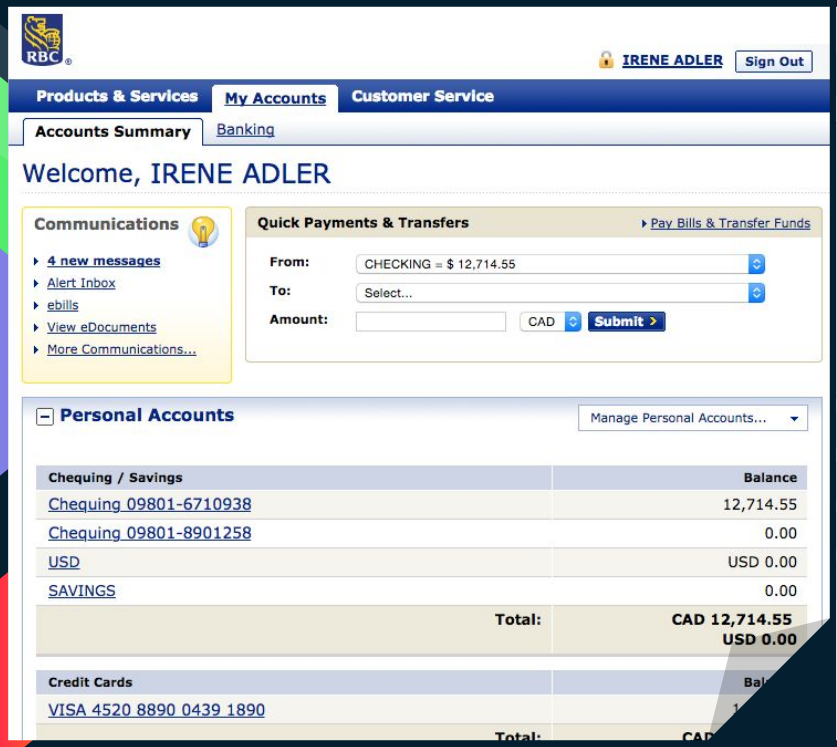
Problem

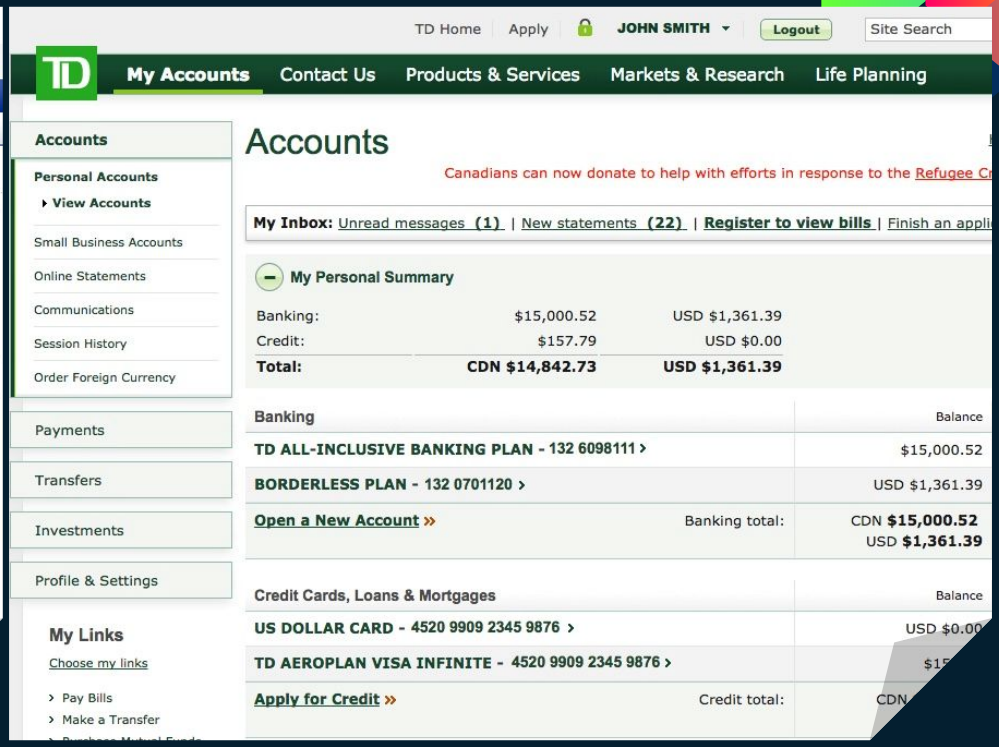
Problem

- People have multiple bank accounts

Problem

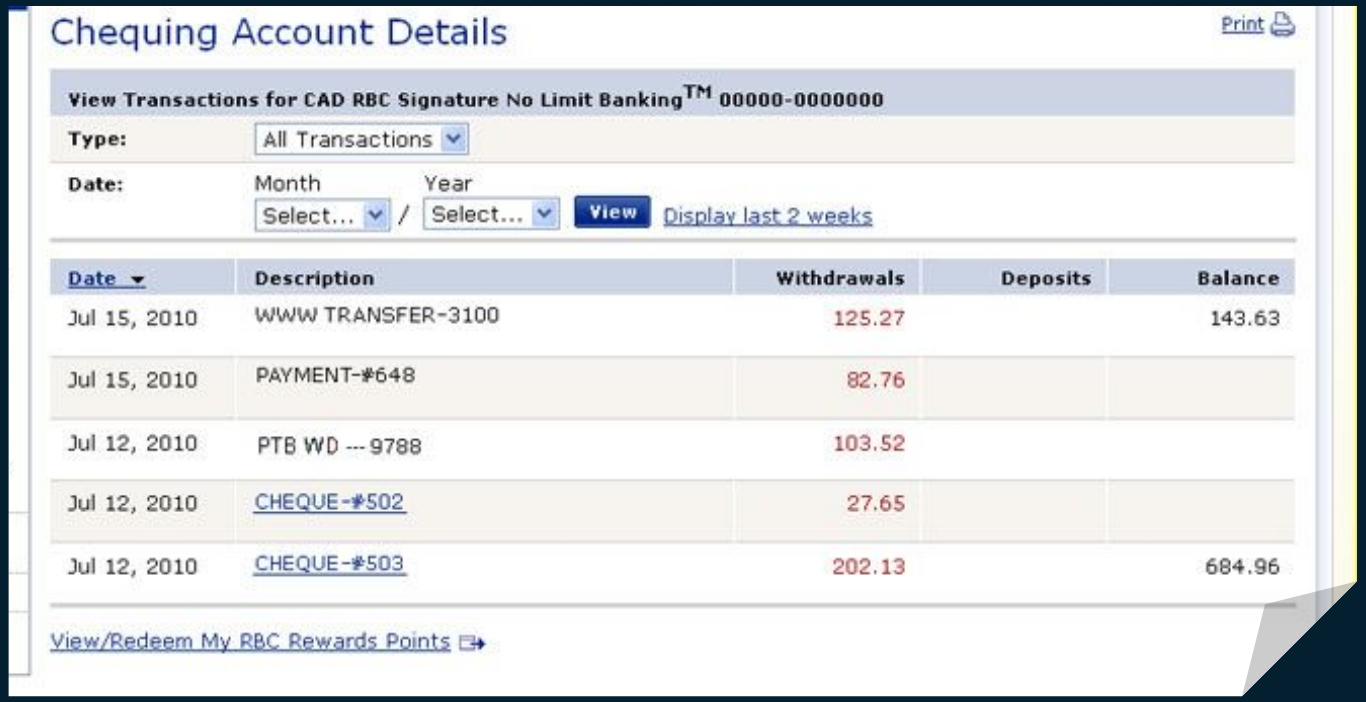
- Need to learn how to use online banking for each institutions





Problem

- Features are limited in current solutions



Chequing Account Details

Print

View Transactions for CAD RBC Signature No Limit Banking™ 00000-0000000

Type: All Transactions

Date: Month Select... / Year Select... View Display last 2 weeks

Date	Description	Withdrawals	Deposits	Balance
Jul 15, 2010	WWW TRANSFER-3100	125.27		143.63
Jul 15, 2010	PAYMENT-#648	82.76		
Jul 12, 2010	PTB WD ---9788	103.52		
Jul 12, 2010	CHEQUE-#502	27.65		
Jul 12, 2010	CHEQUE-#503	202.13		684.96

View/Redeem My RBC Rewards Points

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Banking Simplified.

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- Cumulated Balances/History
- Dashboard & Visualizations
- Categorized Transactions
- Customized Payments
- ... And More!

Gathering User Requirements

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Gathering User Requirements

- Techniques Used
  Survey & Interview
- Users Selected
  Canadian bank account holders

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65%

track their spendings on monthly basis

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42 minutes

spent on online banking every month

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83%

pays bills through online banking

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50%

have 3 or more banking accounts

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9 out of 10

think visualizations can help analyze spendings and balances

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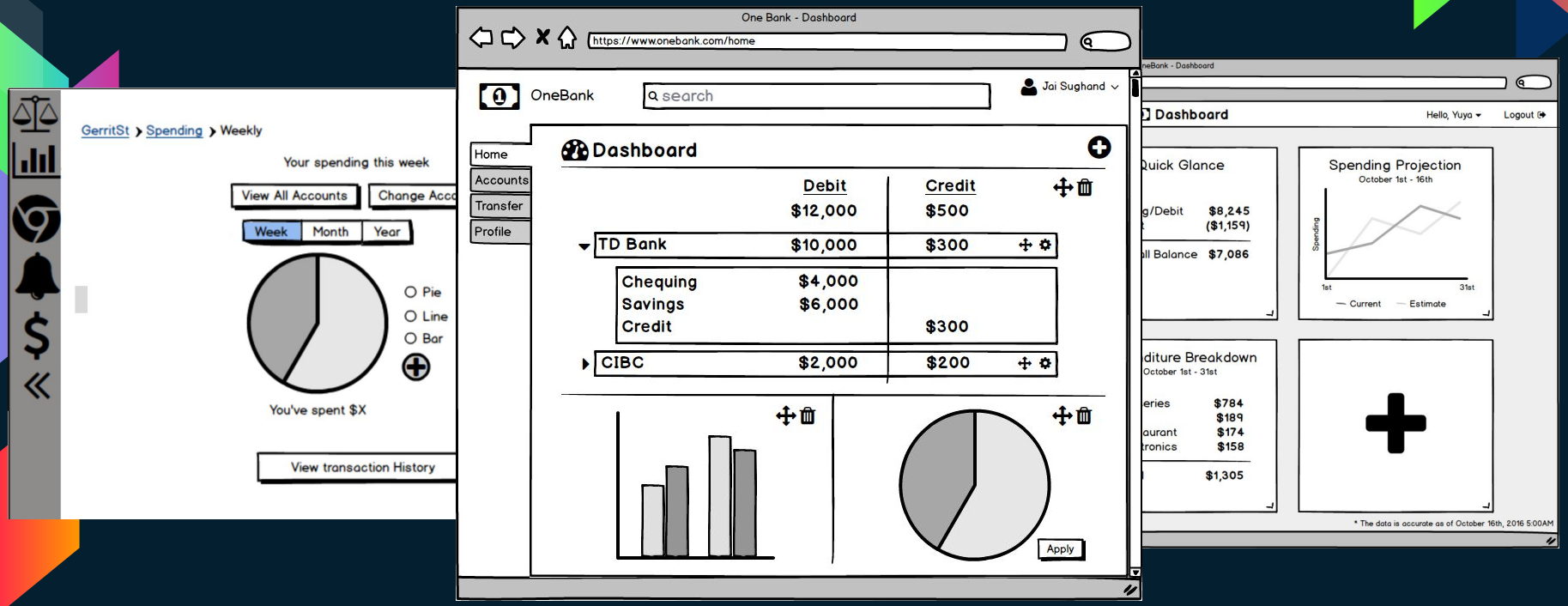
Interview

- Questions
  - Opinions towards online banking
  - Compare common tasks with existing solutions

Interview

- Questions
  - Opinion and feedback towards our low-fidelity prototypes



Interactive Prototype

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Interactive Prototype

- Technology Used
  HTML Bootstrap 3
  Balsamiq Mockups

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Interactive Prototype

- Tasks Selected
  1. Create account and link banks
  2. Pay tuition with different bank accounts
  3. Finding the most expensive meal spent on

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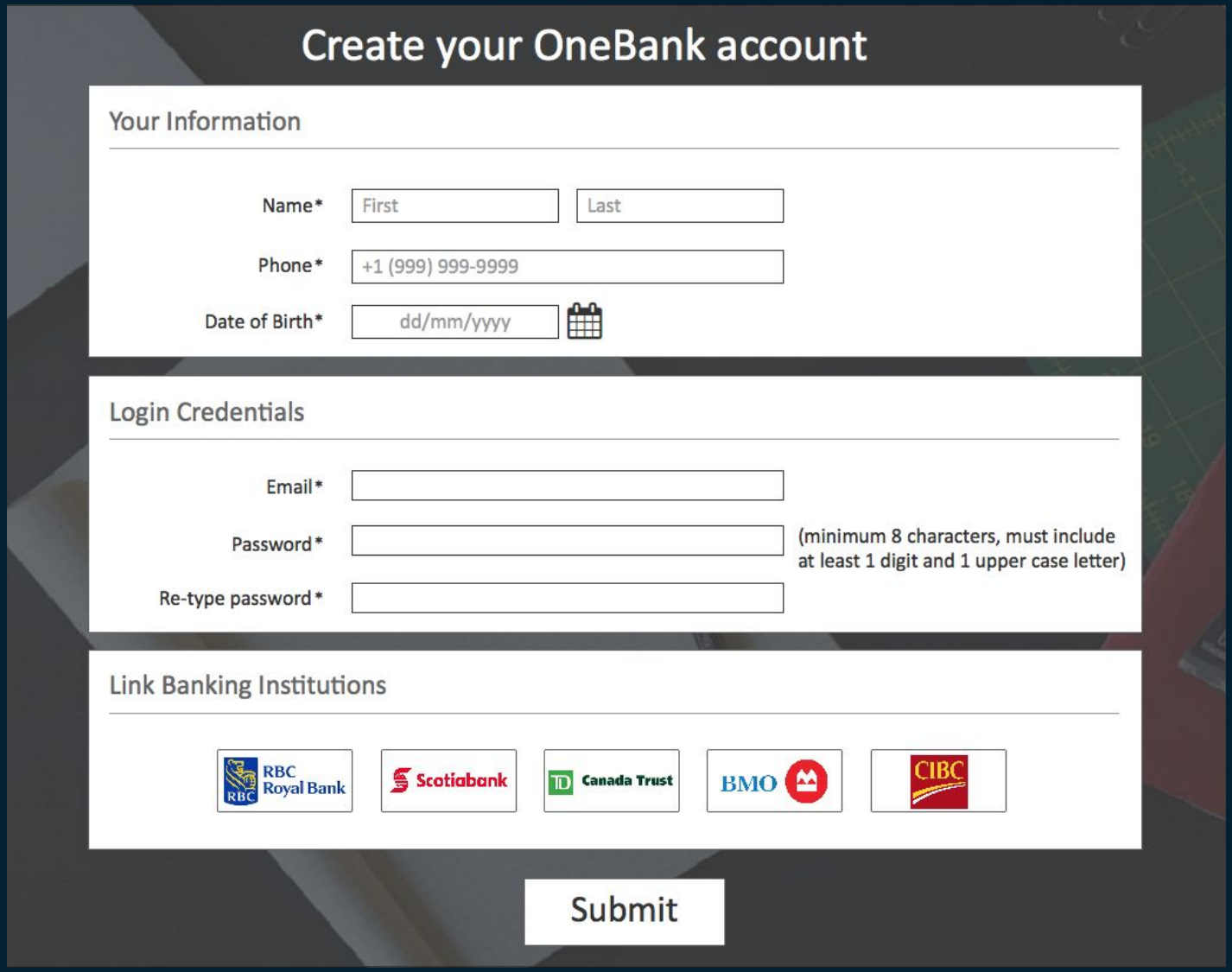
Create account and link banks



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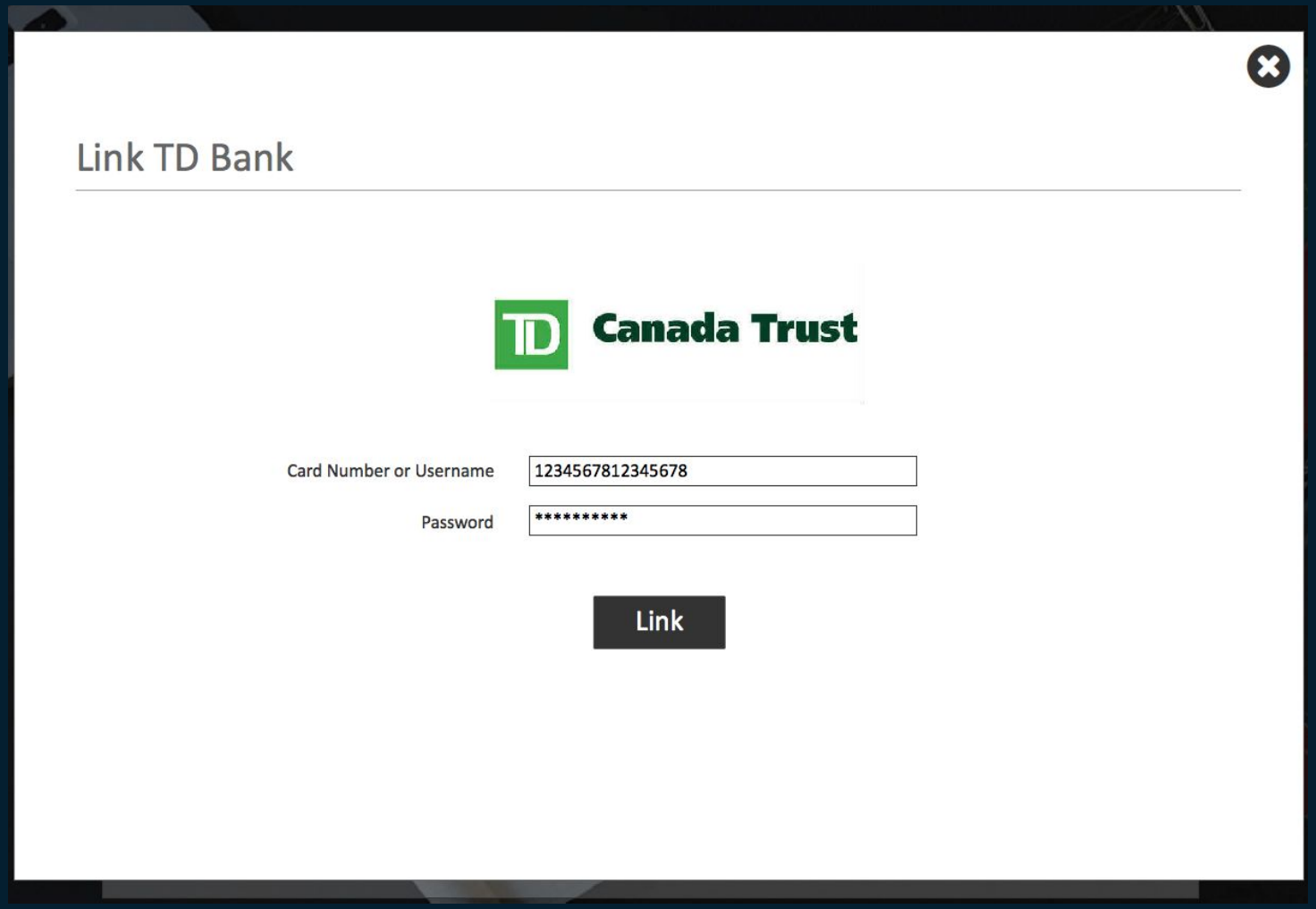
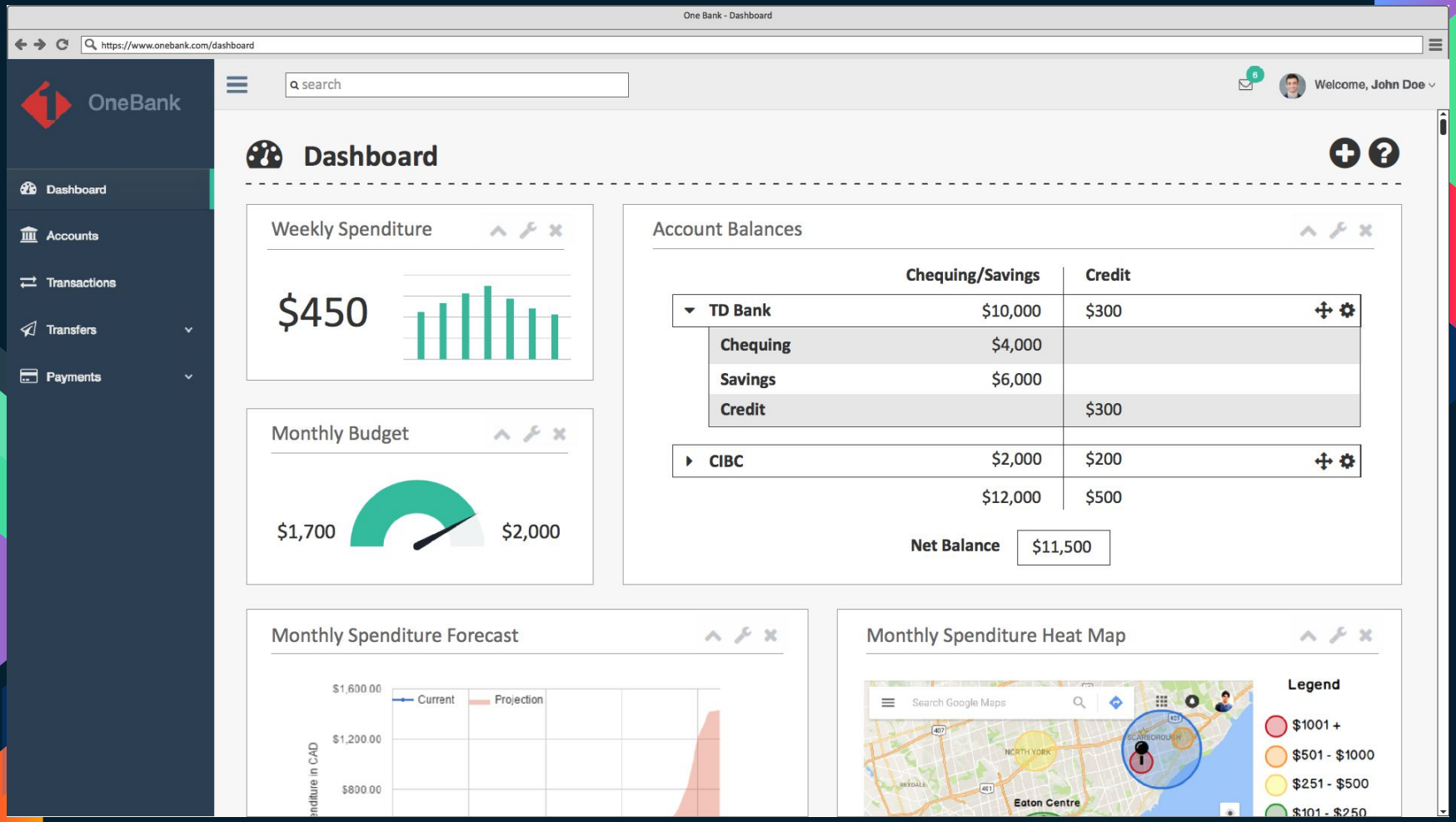
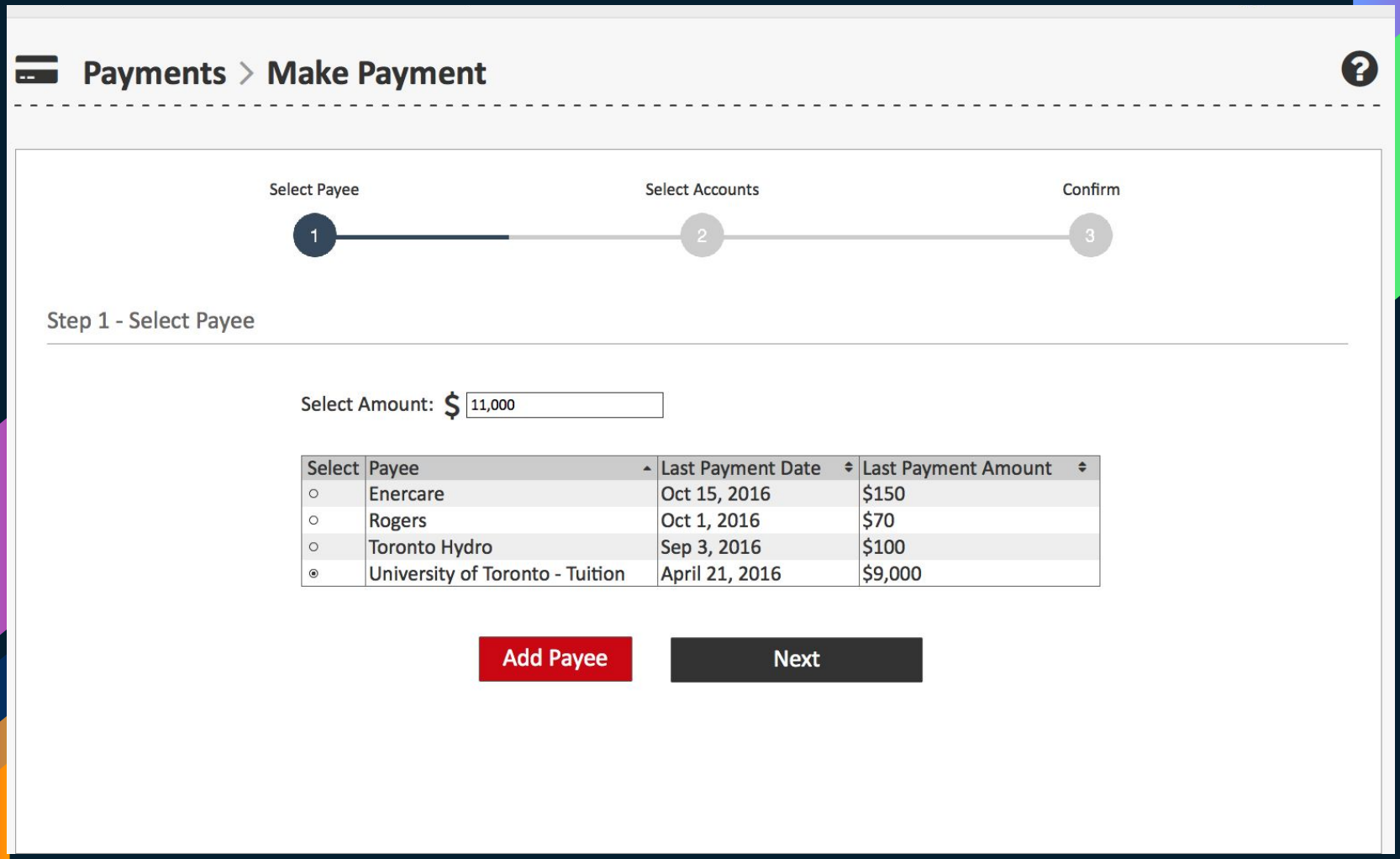


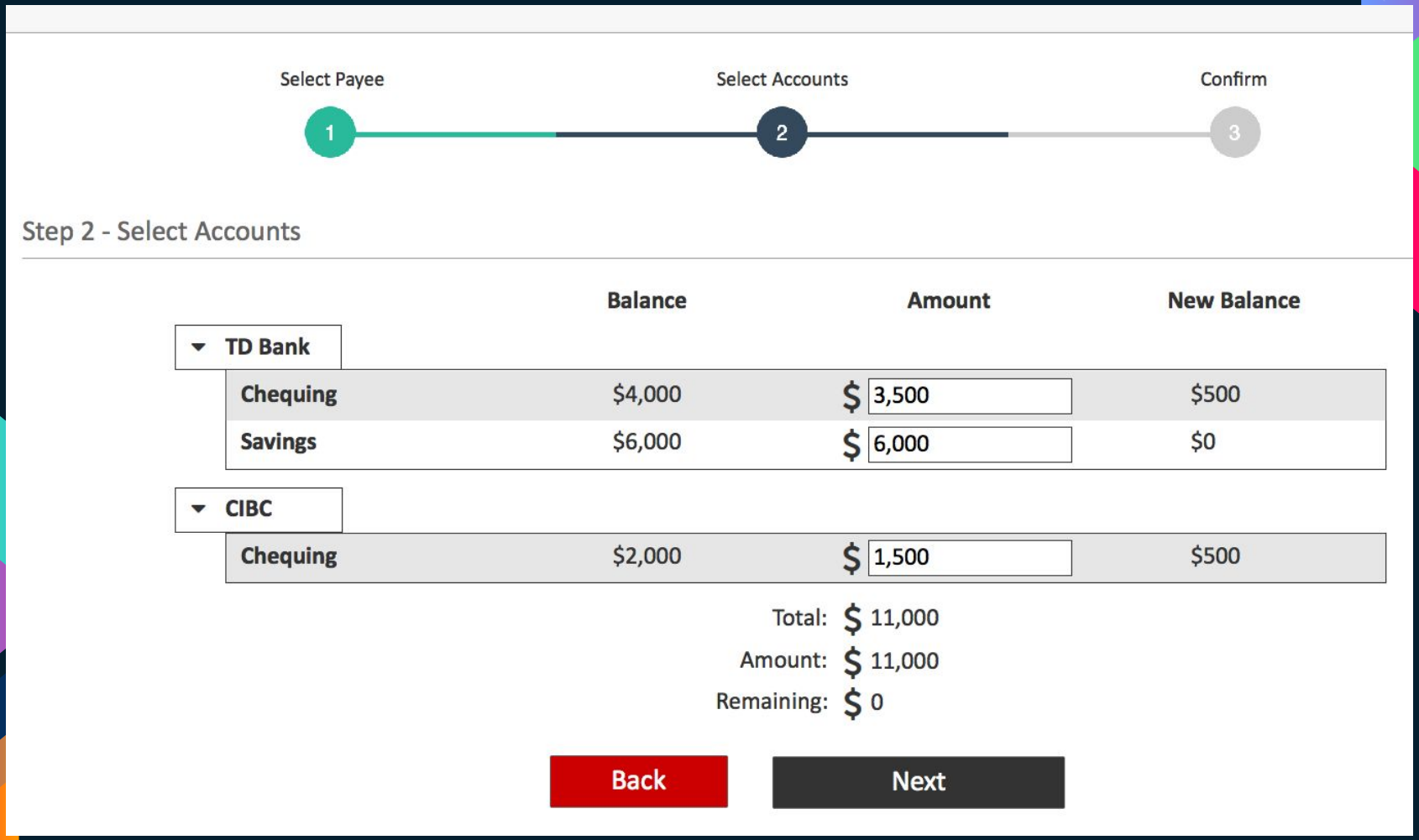
Create account and link banks



Pay tuition with different bank accounts



Pay tuition with different bank accounts



Finding the most expensive meal spent on

Transactions

Showing **Sep 25, 2016** to **Oct 25, 2016**

Filters

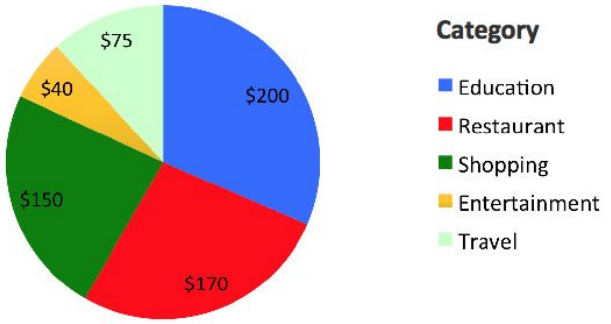
Date Range: dd/mm/yyyy to dd/mm/yyyy

Last 30 days | Last 60 days | Last 90 days

Category: ☐ Education ☑ Restaurant ☐ Shopping ☐ Entertainment ☐ Travel

Select All | Unselect All

Apply



search

Date	Transaction	Debit	Credit	Category
20-Oct-16	UTSC Book Store	$200		Education
18-Oct-16	Pizza Hut	$40		Restaurant
16-Oct-16	Hakka Legend	$30		Restaurant
14-Oct-16	Uber	$75		Travel
12-Oct-16	Akiro Sushi	$80		Restaurant
10-Oct-16	Cineplex	$40		Entertainment
08-Oct-16	American Eagle	$150		Shopping
06-Oct-16	La Prep	$20		Restaurant

Usability Evaluation

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Usability Evaluation

- Techniques Used

  Focus Group (5 people)

  Controlled Setting

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“Color scheme is nice!”

“I like the analytics, really clear”

“Dedicated login page so that I don‘t have to do one more click”

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Banking Simplified.

Thank you for your time