Research Plan

Stakeholders (Who) **& Objectives** (What)

Our primary users are students over 18 years old and enrolled in a university. With the research plan, we found what our stakeholders know about finances, namely how informed they are about four different topics:

What do they know about **Budget Management**, and how do they manage their budget proportionally to their short and long-term objectives?
What do they know about **savings**? Does their bank provide a way to calculate the respective savings they need?
What about **investments**? Do they know how to invest, what assets they have, or what their bank offers?
And the last topic is **Health Insurance**, where we would like to know if our stakeholders know what Health Insurance is, what it supports and how to do one if needed.

Research Insights (Methodology)

With the aim of gathering data to conduct our research, we decided to perform a Google Forms with two iterations.
The first one aims to get a general idea about the users' wisdom and difficulties related to each theme. The second iteration focuses on more specific questions to understand why the users don't know about a particular piece or if the bank application provides the information to the end users for them to be informed. In addition, the second iteration focuses more on the **why**, whereas the first iteration focuses more on **what**.