

**Tasks:**

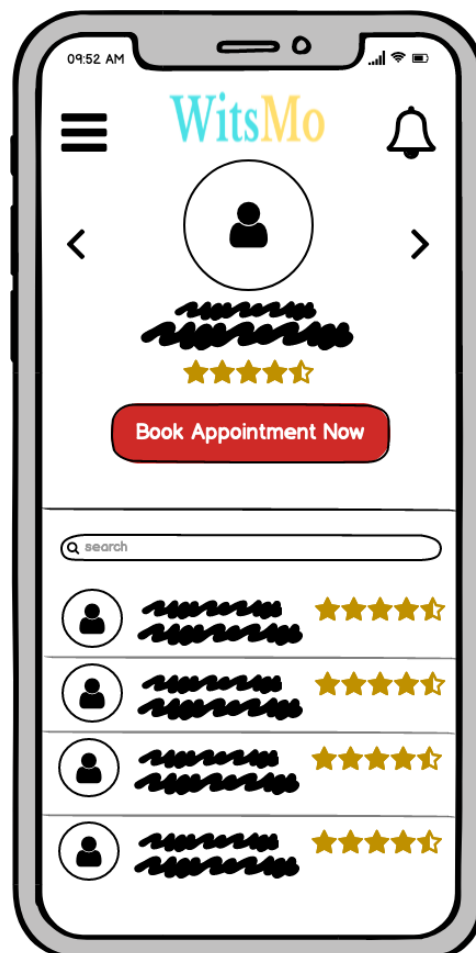
- Briefly explain your project.
- Create a prototype by using a prototyping tool (e.g., Balsamiq, Proto.io, Powerpoint, Photoshop, etc.) of 5 pages.
- Explain your rationale -why you choose to prototype these 5 pages.
- For each page, explain why you design what you design (e.g., why do you put a button on the right side as opposed to on the left side) and why do you think that the UI will help enhance the UX –i.e., back up your design.

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**Project Summary:**

WitsMo is a platform to facilitate the contact between people in need of financial guidance and financial experts looking for additional clientele and revenue. Thus the motivation for WitsMo is to alleviate financial anxiety by supplying on-demand financial therapy. People looking for financial advice may sign up and pay-per session with readily available experts. They will be able to create a personalized profile that will recommend specific financial experts to suite their personality. In contrary financial experts will be able to sign up as advisors and supply their expertise through informal video chats in exchange for a Monterey fee. Additionally, WitsMo will also offer financial education through pre-recorded lectures and referenced literature. We will be developing the mobile app for WitsMo to support these functionalities. A web app is already in progress but we will be building the mobile app in concurrent with the web app team.

**Prototype Page (1): User (Non-Financial Expert) Page**



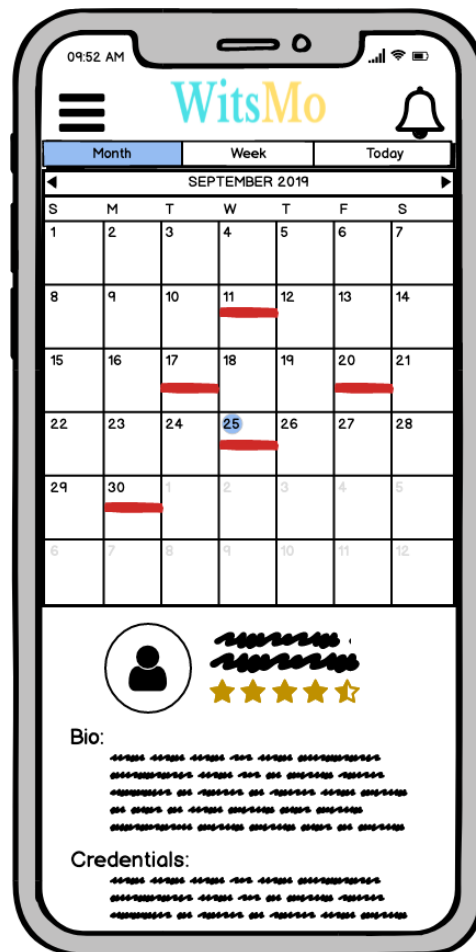
### **Why This Page (1):**

The Non-financial page is vital to the application because this will be the first screen that the user will interact with after logging into their personal accounts. From this page the user will be able to immediately book an appointment with a financial expert (which will take them through the booking process), go into their settings, view any notifications, or search through the database of financial experts.

### **Why This Design (1):**

After looking through a few popular apps I realized the first page should push the user to do the main action of the app. For example in Uber you are immediately given a map and a search bar to find an address to travel to. So for this page the first thing that user should see is booking with an advisor. In the top center (where the user will most likely look at first) I designed a panoramic sliding feature similar to iTunes that advertises musicians but in our case we will be advertising financial experts. The current financial expert will have a profile photo followed by their name, current professional title, and their average rating. This block of their information will move horizontally after a specific amount of time and a new financial adviser will appear taking the top-center position. There will be arrow on both sides indicating to go back or forward through the list of advertised financial experts. There will be a big Red button underneath to book with the current financial expert in the center that will read "Book Appointment Now". The Red will allow it to stand out and hopefully make the user gravitate to it. The "Now" word in the button will hopefully give a sense of urgency as well. There will be a collapsed navigation bar (Burger Menu) on the top left and a Bell icon for notifications. The collapsed nav bar gives a bit of simplicity to the screen instead of making all the menu items visible since on the phone there is not much screen to work with. The Bell icon will be clear, showing only the outline of the bell, this will add to the simplicity look. Additionally right under the center block will be a section for the user to easily search for financial experts. The search bar is easy to access as we want the user to immediately be able to search without them going through any unnecessary steps. Below the search bar will be a list of some financial experts to help the user see the connection between the search bar and the list of financial experts and show them that there are more financial experts for them to look at if the advertised ones catch the user first. Lastly the stars are colored gold so that the more gold shown the more attracted the user will be to that financial expert profile (flashy-ness).

## Prototype Page (2): Expert User (Financial Expert) Page



### Why This Page (2):

This will be the first page that financial experts will be taken to when they log into their site. This page will give the experts the ability to look at their calendar as well as their profile of what potential customers will see when they click on their profile. They will have similar access to settings and the notification center as the regular users will have. Their calendar will display their current booked appointments so can manage their schedules. This page is important because the financial experts are the product that customers want and if the experts cannot easily see and manage their schedule then they cannot supply their advising service to the customers.

### Why This Design (2):

I am following the same ideology as before that the user should be immediately pushed to the primary function of the app when they open the application. In this case, instead of the regular user, the financial-expert will be opening the app and their main function would be to give advice

to the public through online meetings. Their schedule will be the vital element to their application interface. Thus when they open the app their personal calendar will take up most of the screen and allow them to easily see their current bookings. The screen should still be as simple as possible and this should allow them to easily view their calendar at one glance versus clicking on a menu item to get to their calendar. At the very top of the calendar will be different view options to view their calendar in Month, Week, or Day mode. By default it will be on month as that allows them to see the most data at once. There will be red bars on specific days indicating a booking for that day. This was inspired by google calendar. Google has a great calendar because its simple and easy to scan. Thus I want this calendar as big as possible and the red bars to additionally catch your attention. The calendar will ideally be interactive by simply clicking on the calendar day and it will expand showing details of any booked appointments. Below the calendar will be the financial expert's profile. I imagine the second thing they may be interested in is seeing their profile to adjust things or see any new reviews, so I chose to put it below the calendar to make it relatively easy to access and view by simple scrolling more down.

### Prototype Page (3): User (Non-Financial Expert) Page



### **Why This Page (3):**

This page is what a regular non-financial user sees when they click on a financial-expert's profile. This is an important page as this will determine if a user would like to book an appointment with this financial-expert or to look for another one. This page will give the regular user more information on the expert like their full resume, their calendar of availability, and reviews that they have received.

### **Why This Design (3):**


When a user clicks on a profile the financial-expert profile picture will jump to center-top of the page along with their name and current professional title to indicate you are on their profile. Immediately after their basic information will be their full Bio. To make it easier for the user to read. Right under their bio will be three different tabs Resume, Calendar, and Reviews. The resume will be the default tab to show their credentials and experience they have. The calendar tab will display some type of calendar similar to the one in the financial expert page but without any interaction, simply showing availability. Lastly the review page will show a list of reviews written about the expert, with the most recent on the top. The structure of the reviews is inspired by Trip Advisor. Trip Advisor is a review driven site, supplying thousands of review and their structure allows you the ease of reading through reviews. Thus in this prototype page, I mimic their design by placing the reviewer's profile picture along with their profile name and what they rated the expert. Right underneath that will be a few words in big bold letters to summarize their review allowing the user to easily scan the reviews and see what they are saying without having to read through their entire posted review. Underneath the bold summary phrase will be their actual post. However their post will not be fully viewable unless you click on read more which will expand their post to view the entire review. This will reduce the clutter to maintain the simplistic look and not drive away the user. We want them to take a look at the reviews but if they saw large paragraphs they will most likely not read them and not get any use out of the reviews. Instead we will hide the full paragraphs and get the user to read the large summaries first. Lastly, the notification and collapsed nav bar will be gone and a back button will take their place in the top left corner. A user will most likely not access these functions when looking at a particular profile, thus to make it even less cluttered I removed them completely.

### Prototype Page (4): Booking Review/Submit Page

09:52 AM

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## Booking Request Form

Advisor:  [Redacted Name]

Bio: [Redacted Bio]

Credentials: [Redacted Credentials]

Day: Friday, September 27, 2019

When: 2:00pm - 2:30pm

Request

#### Why This Page (4):

This page will be the final step in the process of booking an appointment with a financial expert. After the user chooses a financial expert and selects a day and time when the expert is available then they will be taken to this page. This page will summarize their request so they can review and make sure they chose the expert, date, and time they meant to choose.

#### Why This Design (4):

At the very bottom will be a big red button that says “Request”. This will be at the bottom to hopefully get the users to review the information first before submitting their request. The color red will hopefully attract the user to click on it as well, as we want them to request and the worst thing that could happen is they just cancel their appointment and reschedule so no need to make them think twice before requesting their appointment. The day and time will be in red as well to hopefully catch their attention to make them think about it twice as they make their way down

the page to the request button. The date and time are in editable boxes, so the idea is they will be able to adjust the date and time on the spot if they wanted to. It will be a drop down to avoid any human error. Similar to the financial-expert page, the collapsed nav bar and the notifications bell icon will disappear and the same back arrow will replace them. This will server the same purpose for maintaining simplicity and users will most likely not be checking their settings or notifications at this page. This will let the user be more focused on the review page info as well.

### **Prototype Page (5): Video Chat Waiting Room**



#### **Why This Page (5):**

This page will be what both the regular users and financial-expert users will see when they are waiting for the other user to join on the video chat. This is an important page because this will be the medium between the regular users and financial users.

#### **Why This Design (5):**

This page should be as simple as possible and give very clear feedback to the user. A lot of times when working with video chats there is always a bit of uncertainty if you're in the right place to

receive a video chat, especially since now phone numbers will be exchanged. Thus majority of the screen is gone except for a big circle with the WitsMo logo and the phrase “Waiting for (client or advisor) to join...”. This will be clear to the user that they are in the chat room and there is nothing to do but wait until the other user joins. The big circle in the center will be pulsating which will give feedback to the user that the app is still working instead of just a static circle which the user could think it could the app froze their waiting for a long time. At the bottom will be basic video chat icons like audio mute, camera mute, and hangup. The hangup icon will be red so the user can easily locate the icon as the background will unpredictable. Lastly the collapsed bar and notifications bell icon will be replaced by the same back arrow again to give more space for the video chat as we want to utilize as much go the screen possible when video chatting.

**References:**

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