

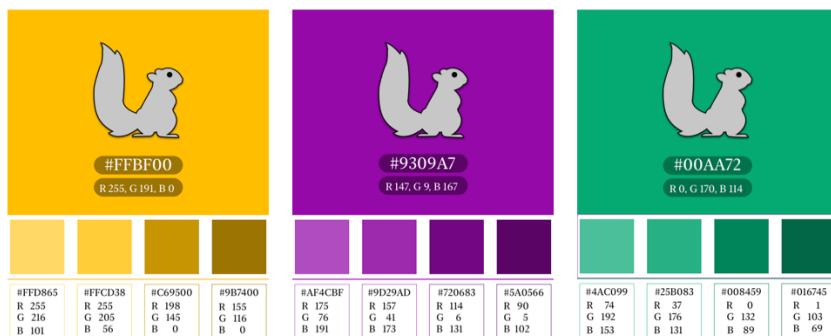
ABOUT

SQUIRREL AWAY is a fictional app that empowers people to achieve savings for a special objective.

This project began with a competitive analysis, examining a plethora of savings applications including traditional banks, large and popular money-managing platforms such as Mint and Dobot, as well as many smaller savings apps available for mobile devices. Squirrel Away has been kept to one specific purpose: keep an eye on where the money is going in order to save for a particular goal.

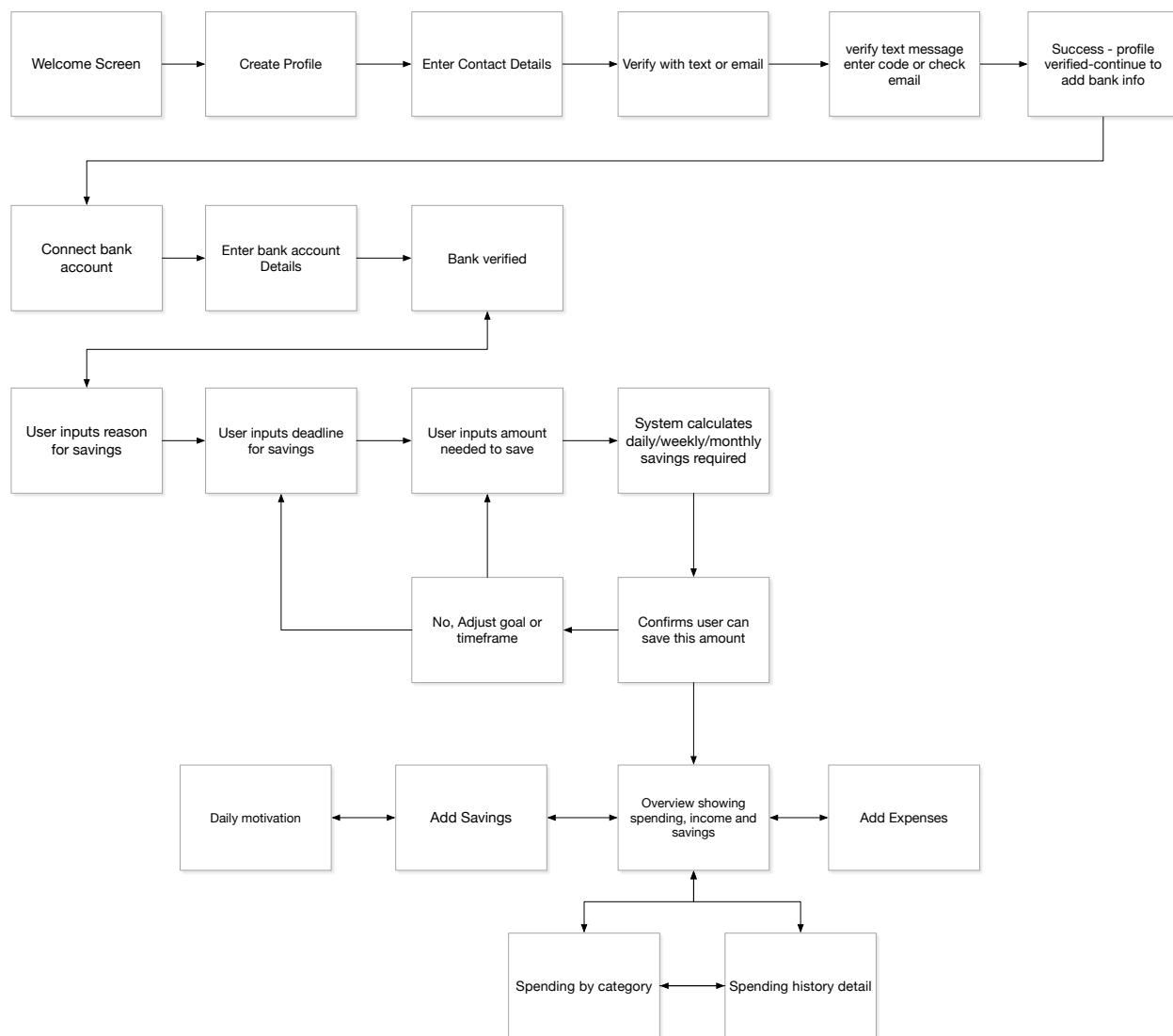
Squirrel Away's logo and mascot is the industrious rodent who always remains steadfast, busily preparing every day to ensure goals are met.

Our palette consists of a vibrant triad of gold, purple, and green, representing wealth, luxury, and money.



User flow diagram

After taking the user through the onboarding process they are guided through linking a bank account, setting a goal, a deadline, and goal dollar amount. Once confirmed, the user can see an overview of their spending, income, and savings.



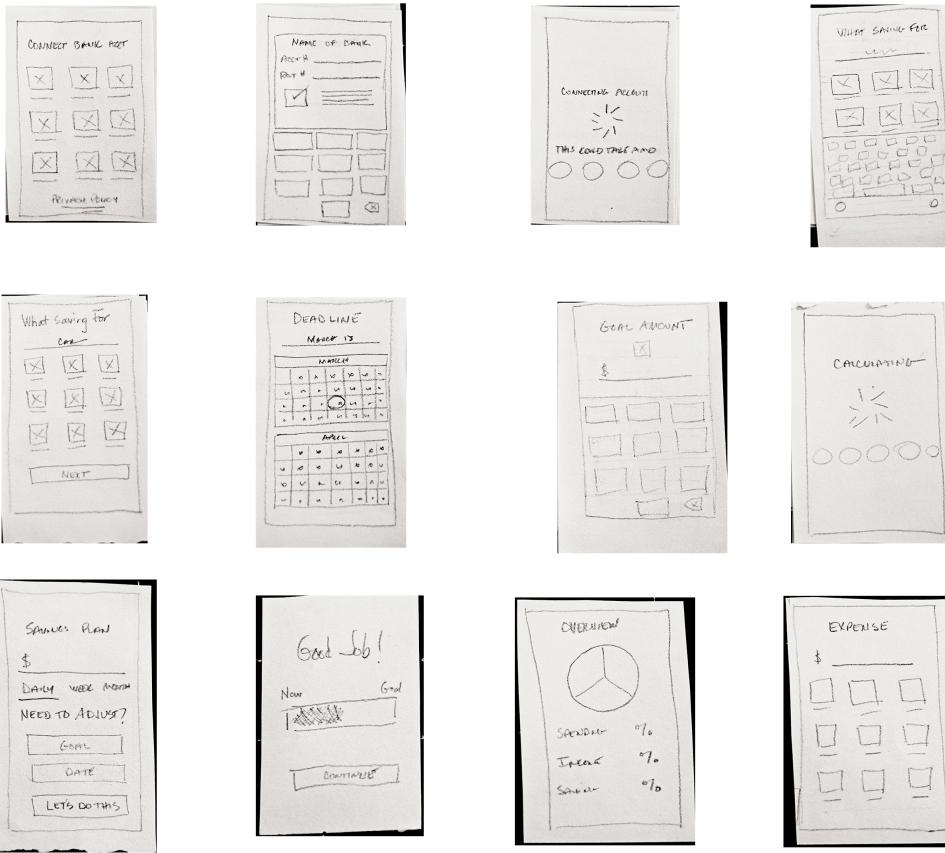
User Stories

- As a money-saver, I need to be able to input information on the money I am receiving and spending (and on what) so that I can see an overview of my finances.
- As a user, I want to see an overview of how much my finances have changed and how much I am saving throughout the saving period, so that I can stay on track.
- As a user, I need to be able to tell the tool what my savings goal is and how long I have to reach it, so that I can save accordingly.
- As a user, I want to receive a personalized savings plan, so that I can save enough money to reach my goal in time.
- As a user, I want to see a dashboard of my finances clearly and visually, so that I can see how much I am spending on what at a glance.



Wireframes

Low-fidelity pen and paper beginning with connecting a bank account



Mid fidelity



Back to Sketch for high-fidelity

SQUIRREL AWAY!

The wireframes show the following steps:

- Create Account:** A screen with a "Create Account" button and a "Maybe Later" button.
- Enter Personal Information:** Fields for First Name, Last Name, Email, Password, and Confirm Password. Includes a note about bank-level security and a "VERIFY WITH" section for Text or Email.
- Account Created!**: Confirmation message with a "Let's connect your bank account" button and a "Maybe Later" button.
- Log In:** Fields for Email and Password, and a "Forgot my password" link.

CONNECT A BANK ACCOUNT

The wireframes show the following steps:

- CONNECT A BANK ACCOUNT:** A list of supported banks (CHASE, BANK OF AMERICA, U.S. BANK, TD, FIFTH THIRD, CITIGROUP, MARCUS, WELLS FARGO, OTHER) with a note about bank-level security.
- CHOOSE BANK:** A modal for Chase Bank with fields for Account # and Routing #, and a note about terms and conditions.
- CONNECTING CHASE BANK:** A loading screen with a squirrel icon.

WHAT ARE YOU SAVING FOR?

The wireframes show the following steps:

- WHAT ARE YOU SAVING FOR?**: Categories include HOUSING, VEHICLE, VACATION, COLLEGE, EVENT, and CUSTOM.
- CREATE GOAL:** A screen with a star icon and a "Next" button.
- SET DEADLINE:** A calendar grid from January 1 to March 31, 2019.
- GOAL CREATED!**: Confirmation message with a "Edit" button.

CALCULATING PLAN

The wireframes show the following steps:

- CALCULATING PLAN:** A note "Sit tight, we're working on it..." with a squirrel icon.
- HERE'S YOUR SAVINGS PLAN:** Daily, Weekly, and Monthly savings amounts (10.00, 75.00, 300.00).
- ADD TO SAVINGS:** A screen to add a daily amount (300.00) with a note "Do. Or do not. There is no try." -Yoda.
- SAVINGS**: A summary screen for a custom goal with a deadline of March 17, a goal amount of \$120.00, and a note "You've saved 300.00".

MORE NUTS - NICE WORK!

The wireframes show the following screens:

- OVERVIEW:** Shows a progress bar at 75% and a "GOALS" section.
- EXPENSES:** A table of expenses with columns for Date, Item, and Amount.
- INCOME:** A table of income with columns for Date, Item, and Amount.
- RECORD EXPENSE:** A screen to record an expense of \$10.00 with a note "Where was the money spent?".

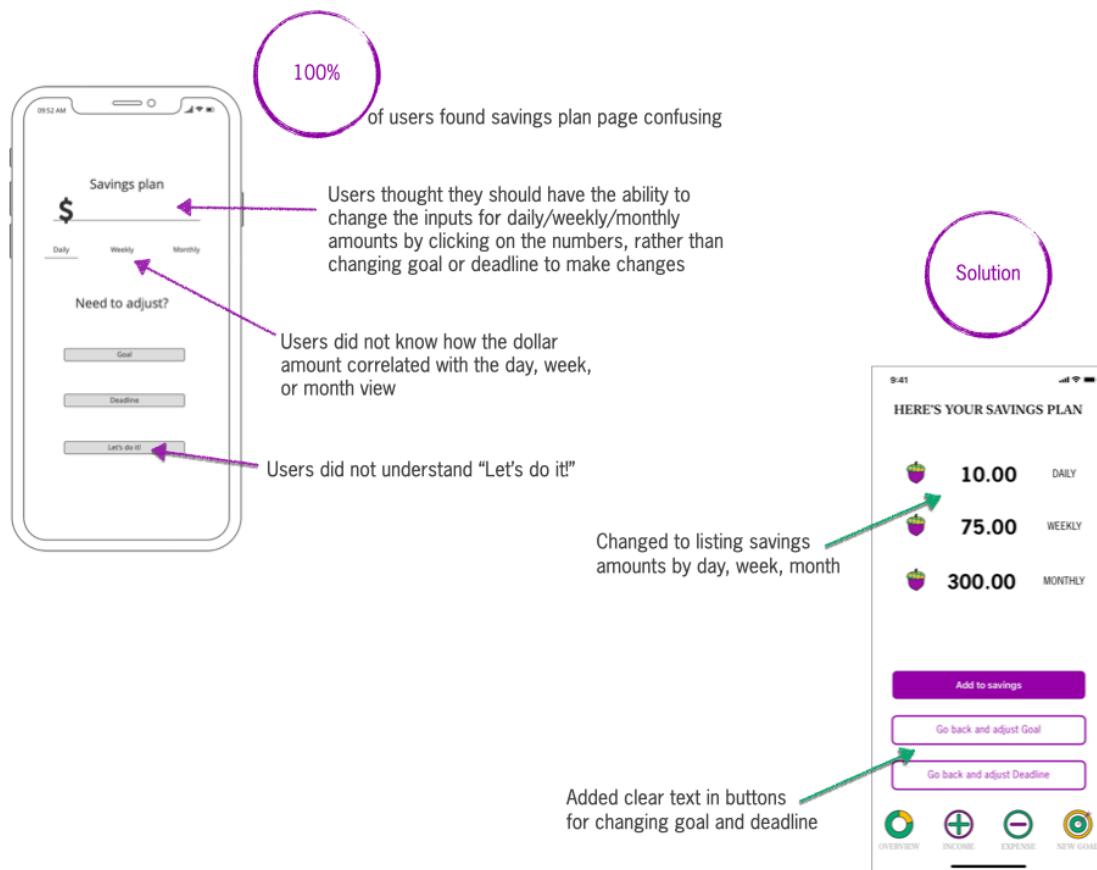
Usability testing notes and results

User understands features including

- Connecting their choice of bank accounts
- Entering their choice of goal and the option to add a custom goal
- How to input a dollar amount for their savings goal
- Confirmation that their goal has been registered and ability to view progress

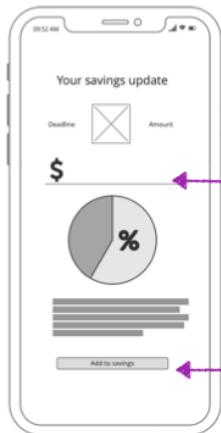
Task #1

"You are using this app to save money for a short-term goal. You would like to enter a savings amount and connect your bank account."



Task #2

"You would like to view your income and expenses and see how your savings goal is proceeding over time."



"What is this number?"

Users wanted more detail such as a way to see their Income and expenses



of users were confused by savings update



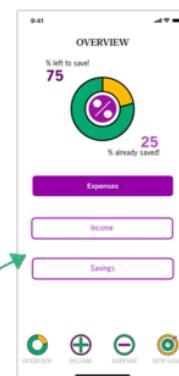
Split into 2 screens to allow for progressive disclosure of information

Savings clearly shows goal and amounts

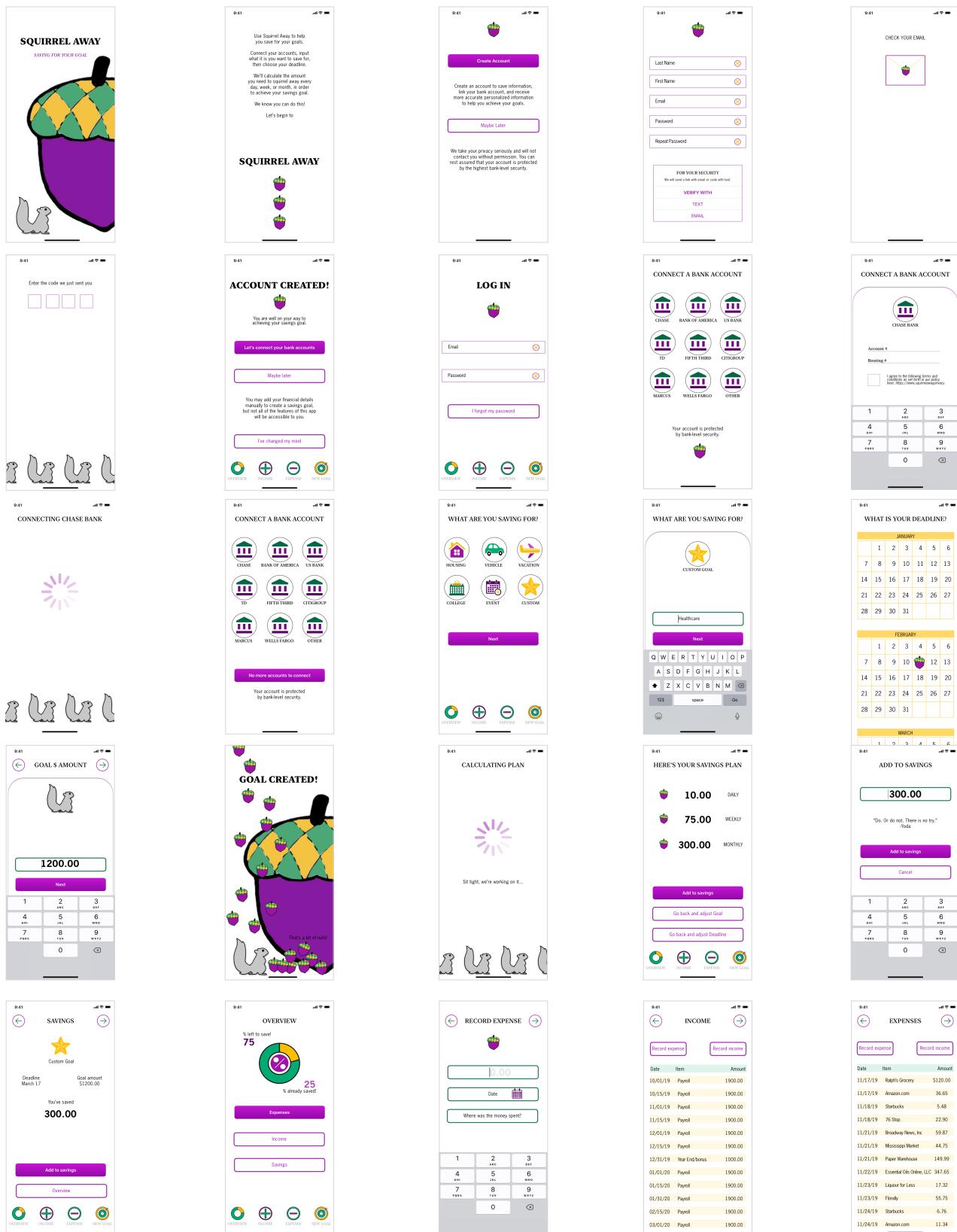


Add to savings - go to Overview

User can get to more levels with Overview screen



User interface design



Desktop and tablet

LET'S SET YOUR GOAL AND GET BUSY SAVING FOR IT!

WHAT ARE YOU SAVING FOR?

- VACATION
- COLLEGE
- VEHICLE
- EVENT
- CUSTOM GOAL
- HOUSING

CHOOSING YOUR DEADLINE

Next will choose the date when you need these funds available. Be sure to be realistic; saving can be challenging when there are bills to be paid.

Take into account not just your monthly bills, but those that come up more irregularly, such as insurance. Also, don't forget an emergency fund!

Maybe an emergency fund is your goal?

PICK YOUR END DATE

JANUARY 2021						
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

SET YOUR GOAL'S AMOUNT

This is no less important than carefully choosing your date. Again, you must be realistic. You will achieve your goal faster if you save a little bit every day. You can always add more fund in your savings account if the days, weeks, and months prove to be extra generous to you!

100.00

Next

OVERVIEW

% left to save!
75
% already saved!
25

Expenses

Income

Savings

OVERVIEW **INCOME** **EXPENSE** **NEW GOAL**

WHAT ARE YOU SAVING FOR?

- HOUSING
- VEHICLE
- VACATION
- COLLEGE
- EVENT
- CUSTOM

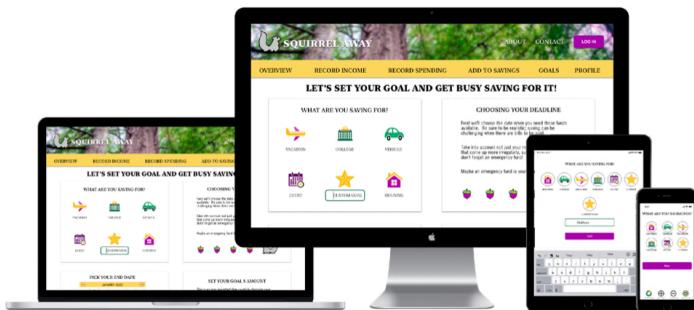
CUSTOM GOAL

Healthcare

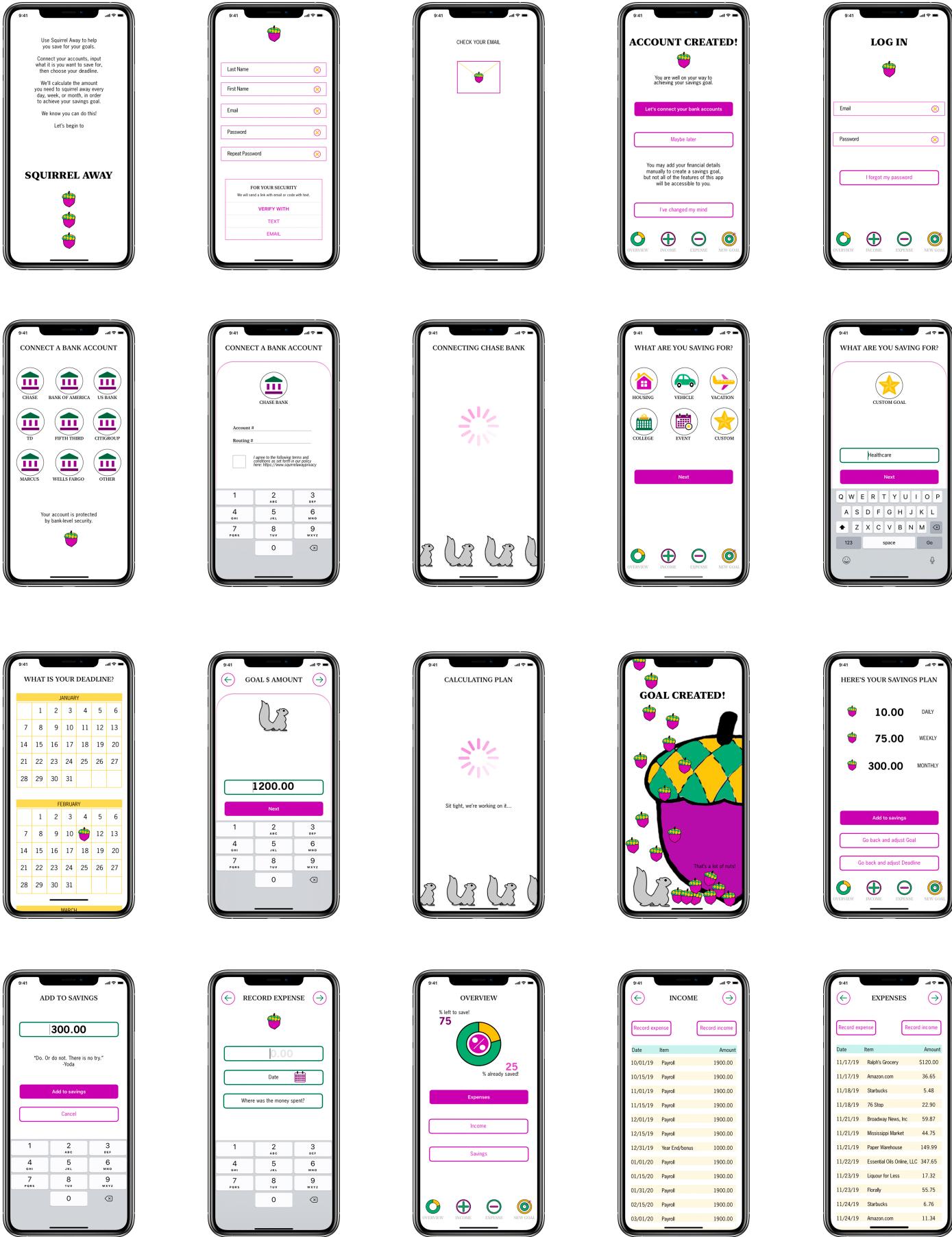
Next



Responsive design



Screen mockups



Animation (I have animation screens and will insert into portfolio)

With *Squirrel Away*, the object was to create a goal-setting app that is simple and easy to navigate, without adding extras that make it more of a banking application. I learned through usability testing that preconceptions by the users of what the app should do could easily lead to adding unnecessary features. Continually referring back to the original objective is a good idea to avoid adding time to a project.

Project duration: 8 weeks