



WELLS FARGO Acceptance_criteria evaluation Report

Feature Key: DIS-4

Summary: Launch AI-powered personal financial assistant

Description: Retail banking users should be able to schedule automatic payments for recurring bills (e.g., utilities, insurance premiums). This feature should support adding/editing/deleting schedules and send reminders 1 day before the scheduled payment.

value: Streamline Customer Interaction and Digital adoption by Increasing the adoption of self-serve digital capabilities. (mobile and desktop)

Acceptance Criteria: * Analyze monthly spending and categorize into predefined buckets.

- * Alert users if they spend 20% more than usual in any category.
- * Recommend saving plans based on income and spending history.
- * Should support user queries like 'How much did I spend on food last month ?'.

Strengths:

- Clear and specific descriptions of functionality
- Addresses key user needs and scenarios

Improvement Areas:

- Lack of Given/When/Then format
- Missing specific conditions and expected outcomes
- Insufficient detail on user interactions and system responses

Revised Version:

Given the user has accessed the expense analysis tool, when they request a monthly spending breakdown, then the system should categorize the expenses into predefined buckets and display the results. Given the user's spending in a category exceeds the usual amount by 20%, when a new transaction is made, then the system should trigger an alert. Given the user has provided income and spending data, when they request a saving plan, then the system should recommend a plan based on their financial history. Given the user asks 'How much did I spend on food last month?', when the query is processed, then the system should display the total amount spent on food.



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Feature Key: DIS-5

Summary: Redesign the business loan application portal

Description: Users should be able to do stuff related to disputes. This is kind of needed for credit card things.

Acceptance Criteria: nan

Strengths:

None

Improvement Areas:

None

Revised Version:

None

Feature Key: DIS-6

Summary: Allow customers to add payees using mobile number

Description: Users should be able to add a new payee to their beneficiary list using the recipient's mobile number if it's linked to a UPI ID or bank account.

value: Optimize System Stability , Reliability, and Processes, Increase the percentage of Transaction processing Products migrating to more efficient platform and efficiency enhancements.

Acceptance Criteria: Given a customer wants to add a payee,

When they enter a mobile number,

Then the payee is added.

Strengths:

- Follows Given/When/Then format

- Clear and concise



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Improvement Areas:

- Lack of specific conditions or validations
- No mention of error handling or user feedback

Revised Version:

Given a customer wants to add a payee, When they enter a valid mobile number that is not already registered, Then the payee is successfully added and the system displays a confirmation message. If the mobile number is invalid or already registered, Then the system displays an appropriate error message.
