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SENIOR UX DESIGNER

TABLEAU ASSIGNMENT

Challenge

Expand number of 18-30 year old customers who use Neighbor Bank. Market research shows customer requests can be summarized to the user stories below:

1. I want to see how much I spend on "x" over "y" amount of time.

2. What percent of my money am I spending on "x".

3. I want to spend "x" on "y" per month.
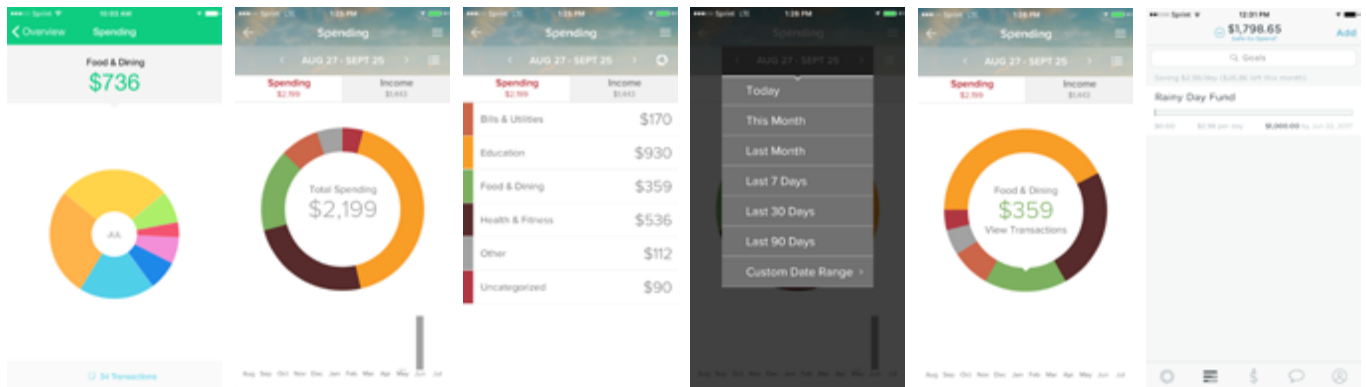
4. I want to save "x" for "y" by "z".

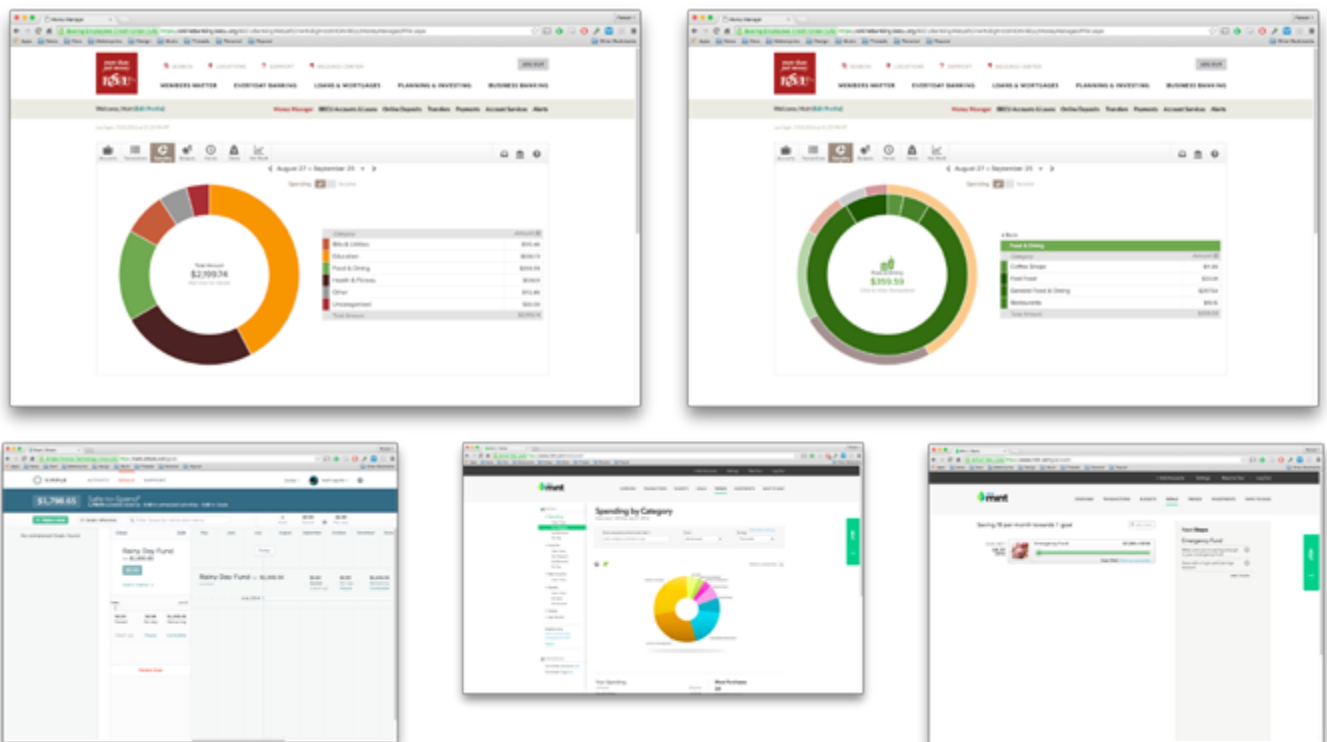**Competitor Research**
Mint, BECU, Simple, Intuit, Capitol One

Takeaways:

- Mobile experience contains very minimal features across the board, primarily on mint.
- Unanimous data visualization for spending habits shown as pie or donut chart.
- Drill down from chart to transactions common functionality.
- No examples of setting budgets on mobile for spending categories. Only example of setting savings goal shown.
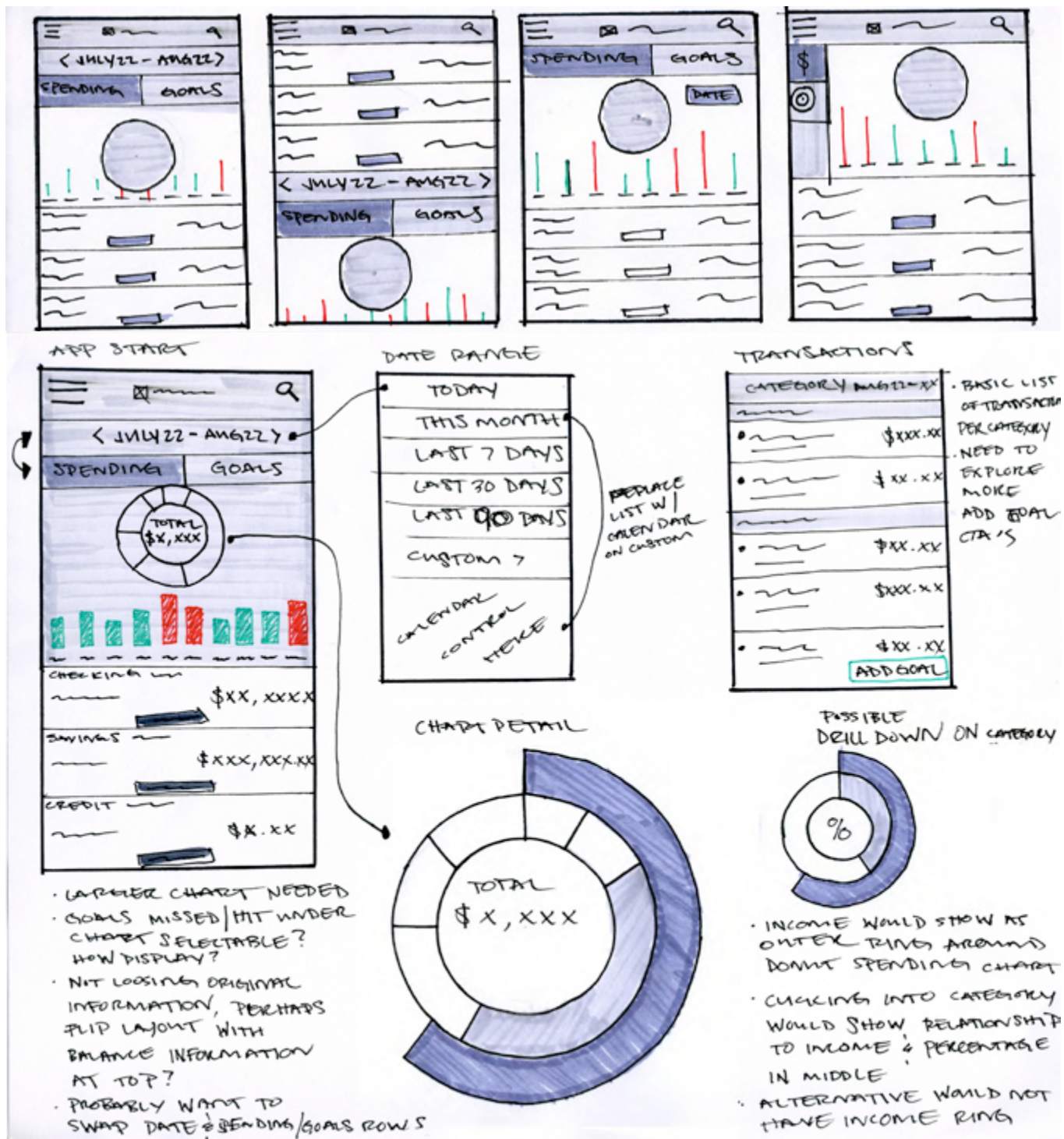
COMPETITOR MOBILE EXAMPLES

COMPETITOR DESKTOP EXAMPLES
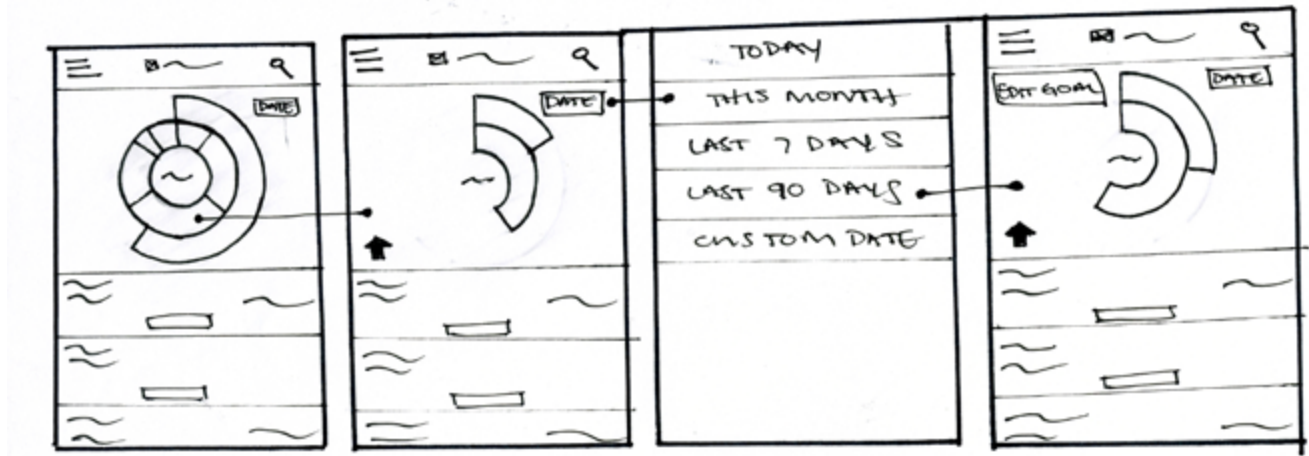
MOBILE SPENDING CATEGORY SKETCHES

APP START

DATE RANGE
- TODAY
- THIS MONTH
- LAST 7 DAYS
- LAST 30 DAYS
- LAST 90 DAYS
- CUSTOM >
- CALENDAR CONTROL HERE

REPLACE LIST W/ CALENDAR ON CUSTOM

TRANSACTIONS
CATEGORY AUG22-XX
- $XXX.XX
- $XX.XX
- $XX.XX
- $XXX.XX
- $XX.XX
- ADD GOAL

- BASIC LIST OF TRANSACTIONS PER CATEGORY
- NEED TO EXPLORE MORE
- ADD GOAL CTA'S

TOTAL $X,XXX

CHECKING — $XX,XXX.XX
SAVINGS — $XXX,XXX.XX
CREDIT — $X.XX

- LARGER CHART NEEDED
- GOALS MISSED/HIT UNDER CHART SELECTABLE? HOW DISPLAY?
- NOT LOOSING ORIGINAL INFORMATION, PERHAPS FLIP LAYOUT WITH BALANCE INFORMATION AT TOP?
- PROBABLY WANT TO SWAP DATE & SPENDING/GOALS ROWS

CHART DETAIL
TOTAL $X,XXX

POSSIBLE DRILL DOWN ON CATEGORY
%

- INCOME WOULD SHOW AS OUTER RING AROUND DONUT SPENDING CHART
- CLICKING INTO CATEGORY WOULD SHOW RELATIONSHIP TO INCOME & PERCENTAGE IN MIDDLE
- ALTERNATIVE WOULD NOT HAVE INCOME RING

ITERATION

Mobile Sketches
Spending Category

I want to see how much I spend on "x" over "y" amount of time.
What percent of my money am I spending on "x".

- Sketches show incorporation of pie/donut chart on app start page, bar charts below pie/donut indicate whether monthly spending budget/goal has been met.
- User would be able to change date range via drop down selection to accommodate desired visualization per category over time. This would solve user story #1, I want to see how much I spend on "x" over "y" amount of time.
- Bottom detail donut chart shows example with outer ring indicating total income, when completed 360 degrees all income will have been spent. This would drill down upon click to specific category in example right. This would solve user story #2, What percent of my money am I spending on "x".

Detail PDF Link

MOBILE SPENDING CATEGORY SKETCHES (CONTINUED)

ITERATION

Mobile Sketches
Spending Category

● **I want to see how much I spend on "x" over "y" amount of time.**
What percent of my money am I spending on "x".

- Top flow shows drill down by tapping on spending category on total spending chart. This would bring you to a chart specific to that spending category, displaying an outer ring that shows category percentage of income. This would solve user story #2, What percent of my money am I spending on "x".

- Bottom flow shows flow for editing/adding a goal/budget for a specific category. Changing the goal/budget would allow user to track their spending habits on a particular category. This would solve user story #3, I want to spend "x" on "y" per month.
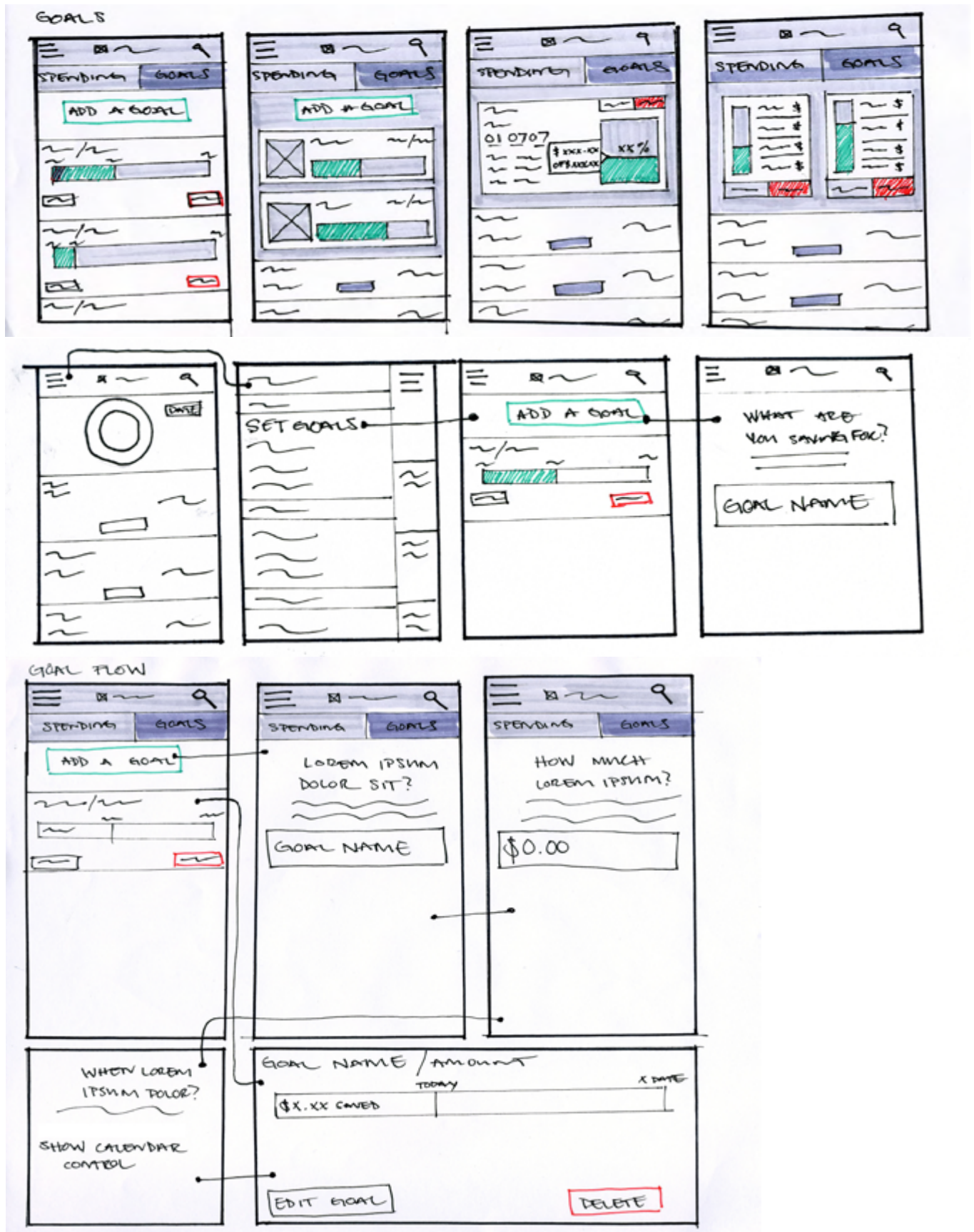

MOBILE GOALS/BUDGET SKETCHES
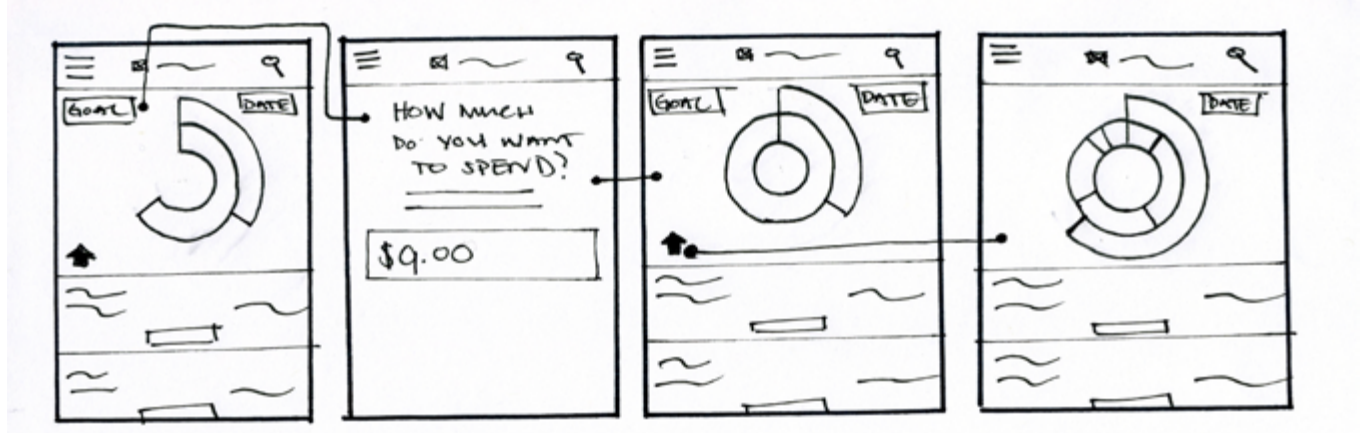
ITERATION

Mobile Sketches
Goals

● **I want to save "x" for "y" by "z". I want to spend "x" on "y" per month.**

- Sketch shows flow for editing/adding a goal/budget for a specific category. Changing the goal/budget would allow user to track their spending habits on a particular category. This would solve user story #3, I want to spend "x" on "y" per month.
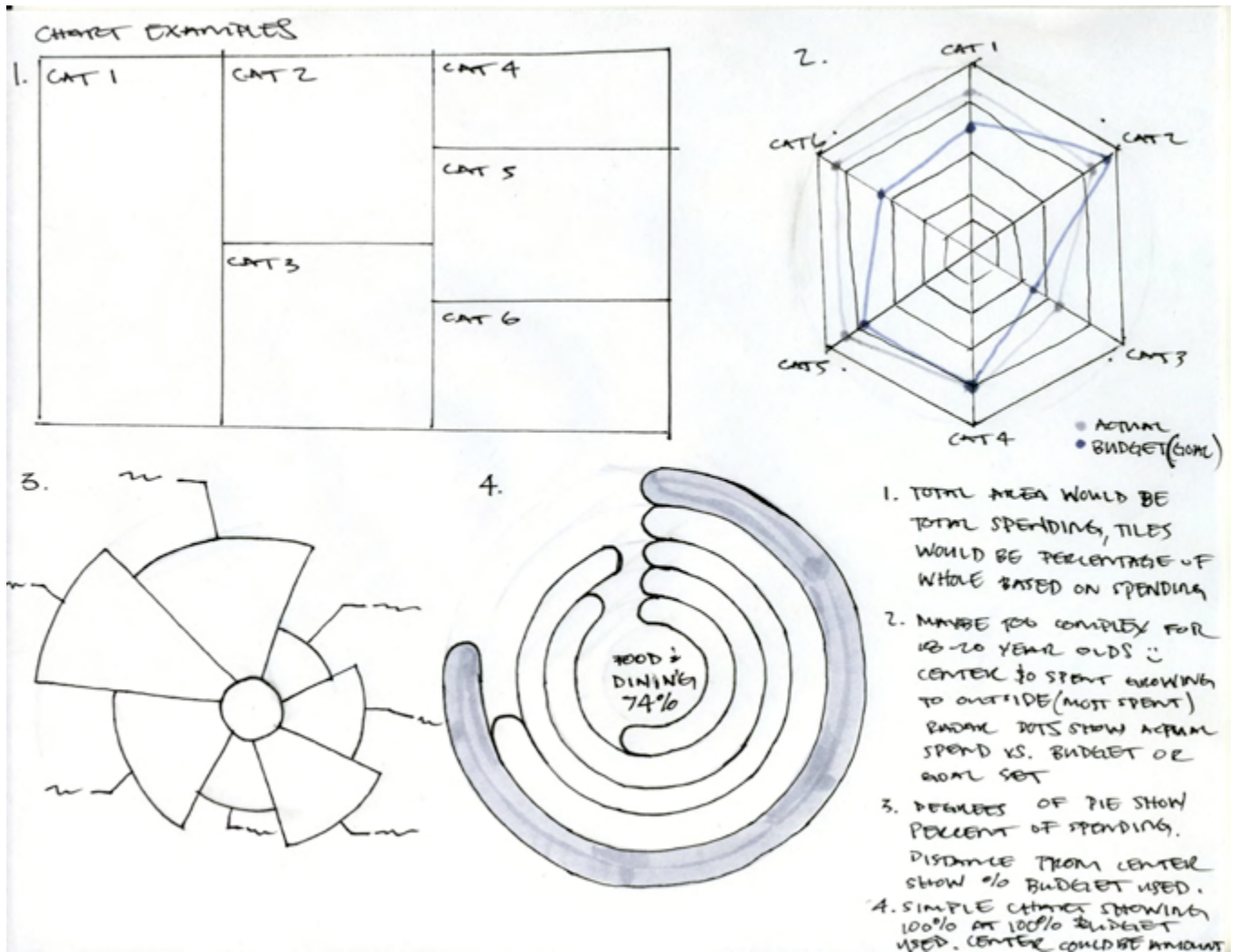
GOAL/SAVINGS SKETCHES

ITERATION

Mobile Sketches

Goals

- **I want to save "x" for "y" by "z". I want to spend "x" on "y" per month.**
  - Sketches show different layouts for visualization of savings goal and/or spending goal.
  - Savings goal flow is shown on the middle and bottom examples, user would name and set savings amount, set save by date and save. This would solve user story #4, I want to save "x" for "y" by "z".

CHART SKETCH EXPLORATION

CHART EXAMPLES

1.

CAT 1	CAT 2	CAT 4
		CAT 5
	CAT 3	
		CAT 6

2.

CAT 1 · CAT 2 · CAT 3 · CAT 4 · CAT 5 · CAT 6

● ACTUAL
● BUDGET (GOAL)

3.

4.

FOOD & DINING 74%

1. TOTAL AREA WOULD BE TOTAL SPENDING, TILES WOULD BE PERCENTAGE OF WHOLE BASED ON SPENDING

2. MAYBE TOO COMPLEX FOR 18-20 YEAR OLDS ☺ CENTER TO START GROWING TO OUTSIDE (MOST SPENT) RADAR DOTS SHOW ACTUAL SPEND VS. BUDGET OR GOAL SET

3. DEGREES OF PIE SHOW PERCENT OF SPENDING. DISTANCE FROM CENTER SHOW % BUDGET USED.

4. SIMPLE CHART SHOWING 100% AT 100% BUDGET USED. CENTER COULD BE AMOUNT
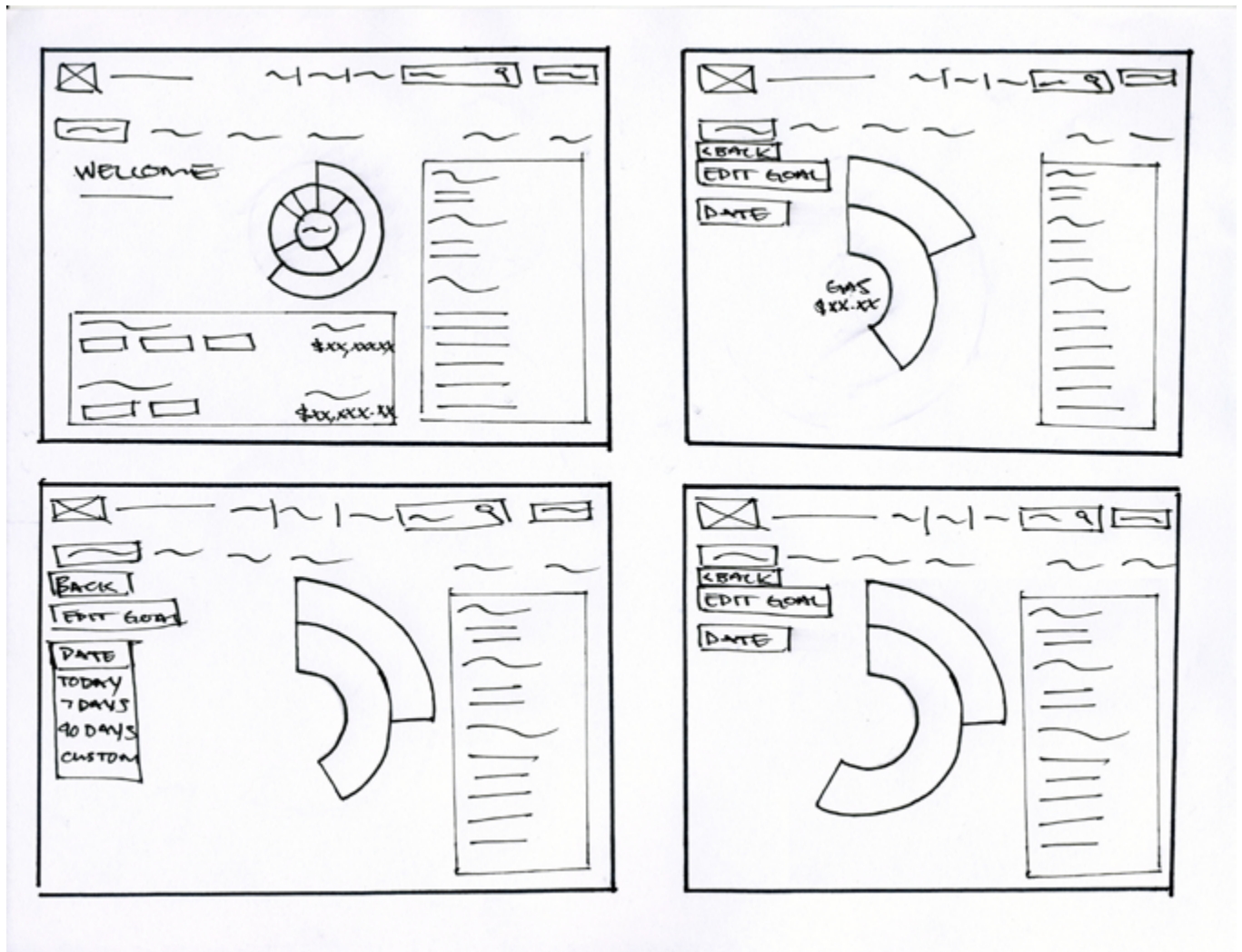
MOBILE WIREFRAMES

ITERATION

Mobile Wireframes
Spending/Goals

● **Solutions for all user stories.**

• Wireframe flows above show basic app navigation with chart drill down on category, chart modification by date, goal
  setting for both category and savings goals.
• Feedback on initial sketches taken into account, tabs removed from app start.
• Proceeded forward with donut chart to fall more in line with industry standards.
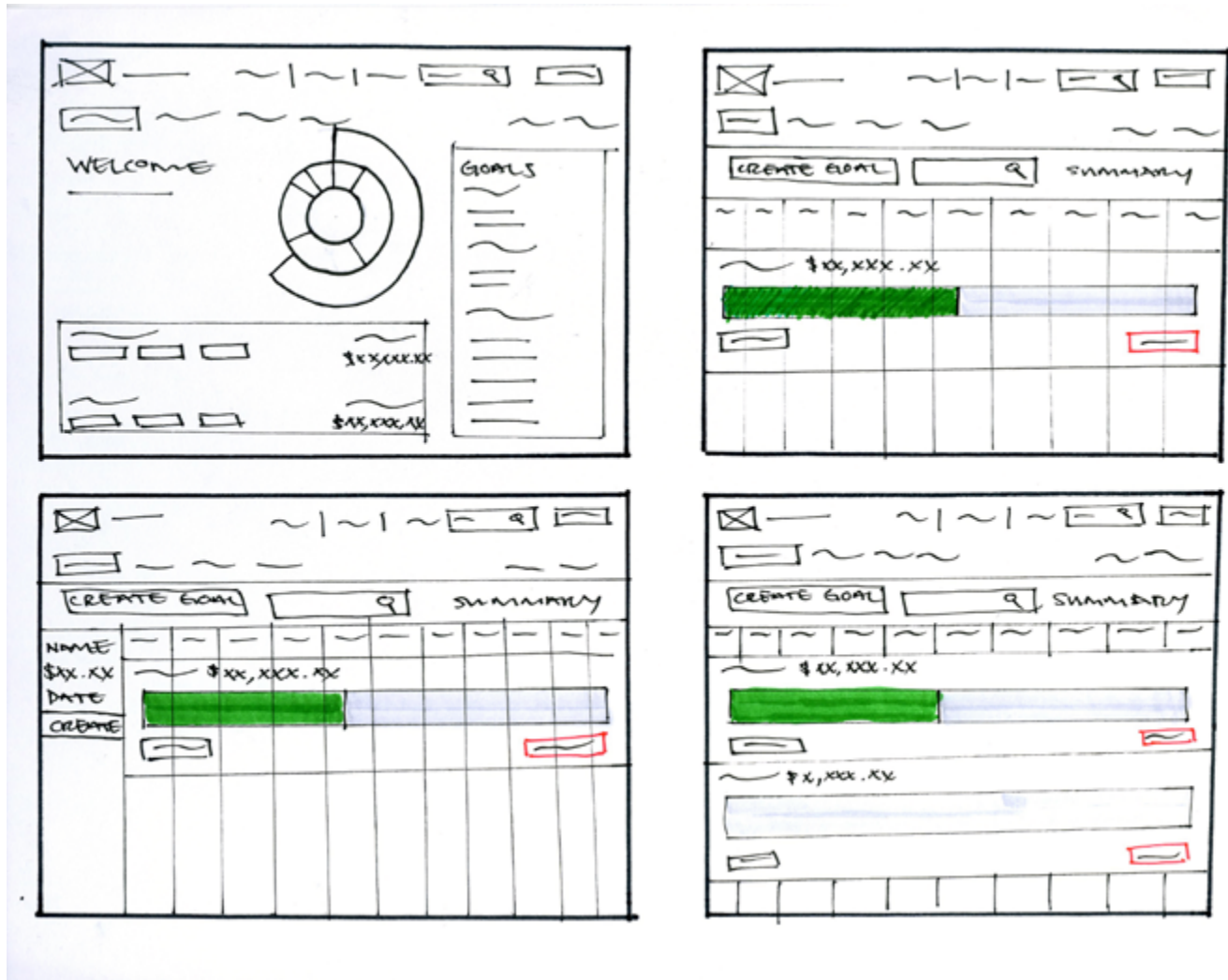
Detail PDF Link

DESKTOP SPENDING CATEGORY SKETCHES

Desktop Sketches
Spending

● **Desktop Sketches for user story #1 & 2.**

  • Sketch above shows desktop flow for spending category left to right. Same drill down as in mobile wireframes except with an alternate layout for desktop.

Detail PDF Link

DESKTOP GOALS/SAVINGS SKETCHES

Desktop Sketches
Spending

● **Desktop Sketches for user story #3 & 4.**
• Sketch above shows desktop flow for savings goal left to right. Similar flow to mobile experience, but less paging involved due to extra space. New goal can be input into left bar that slides out upon clicking 'create goal'. All goal information would be input in this pane.

Detail PDF Link