

### 3 minute Pitch video

Link demonstration:

<https://deakin.au.panopto.com/Panopto/Pages/Viewer.aspx?id=f4d76d84-bef9-4aa2-b329-b1f300bfa3d7>

### Idea Canvas

<b>Company name:</b> DataBytes <b>Project name:</b> DolFin	
<b>Problem Statement</b> Many financially vulnerable individuals struggle to manage their finances effectively, often due to a lack of transparency and understanding of financial data. Traditional banking systems do not cater well to those who may face financial discrimination or low financial literacy, leaving them at risk of further financial instability.	<b>Solution</b> Empowers users by providing a comprehensive view of their finances, actionable insights, and visual analytics. The platform leverages open banking data and AI prediction models to help users make informed financial decisions and improve their overall financial health.
<b>Target Customer</b> <ul style="list-style-type: none"><li>Primary Target: Financially vulnerable individuals who need better tools for managing their finances.</li><li>Secondary Target: People who are underserved or marginalized by conventional financial institutions, particularly those with low financial literacy.</li></ul>	<b>Unique Value Proposition</b> <ul style="list-style-type: none"><li>AI-Driven Insights: Advanced AI models offer personalized financial advice, predicting spending trends and providing insights to improve financial health.</li><li>User-Friendly Design: A chatbot simplifies financial management for users with limited financial knowledge.</li><li>Transparency and Trust: A dedicated "How it Works" page educates users about the platform's data handling and AI operations, building trust and enhancing user engagement.</li></ul>
<b>Impact</b> <ul style="list-style-type: none"><li>Financial Empowerment: Helps financially vulnerable individuals gain control over their finances and make smarter financial decisions.</li><li>Increased Financial Literacy: Simplifies financial data for users who might struggle with complex financial concepts, helping them make more informed choices.</li><li>Promotes Inclusion: Supports individuals who may face discrimination or exclusion from traditional financial services, fostering a more inclusive banking environment.</li></ul>	<b>Key Features</b> <ul style="list-style-type: none"><li>AI-Powered Financial Insights: Uses AI models to predict financial trends and spending behavior.</li><li>Comprehensive Visual Analytics: Provides easy-to-understand financial dashboards with actionable insights.</li><li>Chatbot for Personalized Advice: A user-friendly chatbot offers tailored financial guidance.</li><li>Open Banking Integration: Seamlessly integrates with open banking data to provide real-time financial updates.</li><li>Focus on Transparency: A "How it Works" page explains DolFin's operations, ensuring users understand how their data is used.</li></ul> <b>Customer Journey</b> <ul style="list-style-type: none"><li>Onboarding: Users sign up and connect their financial accounts using open banking APIs.</li><li>Data Analysis: The platform analyzes financial data using AI models.</li><li>Insights and Advice: Users receive personalized insights and recommendations through visual analytics and the chatbot.</li></ul>

### Trello Board

Dolphin Capstone Project

Board

Product Backlog

Project Initialization (Week 1)

Define User Stories

Research Competitors

Identify Key Features

Design and Prototyping (Week 2-3)

Create Lo-Fi Prototype

Add a card

Implementing

Add a card

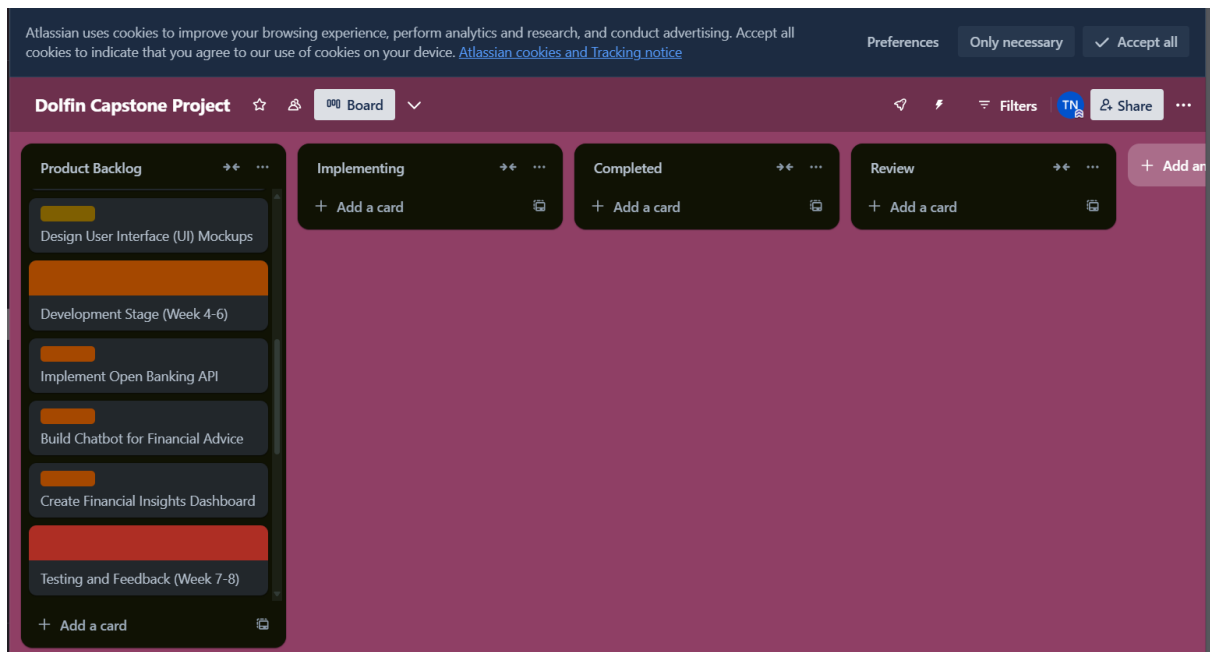
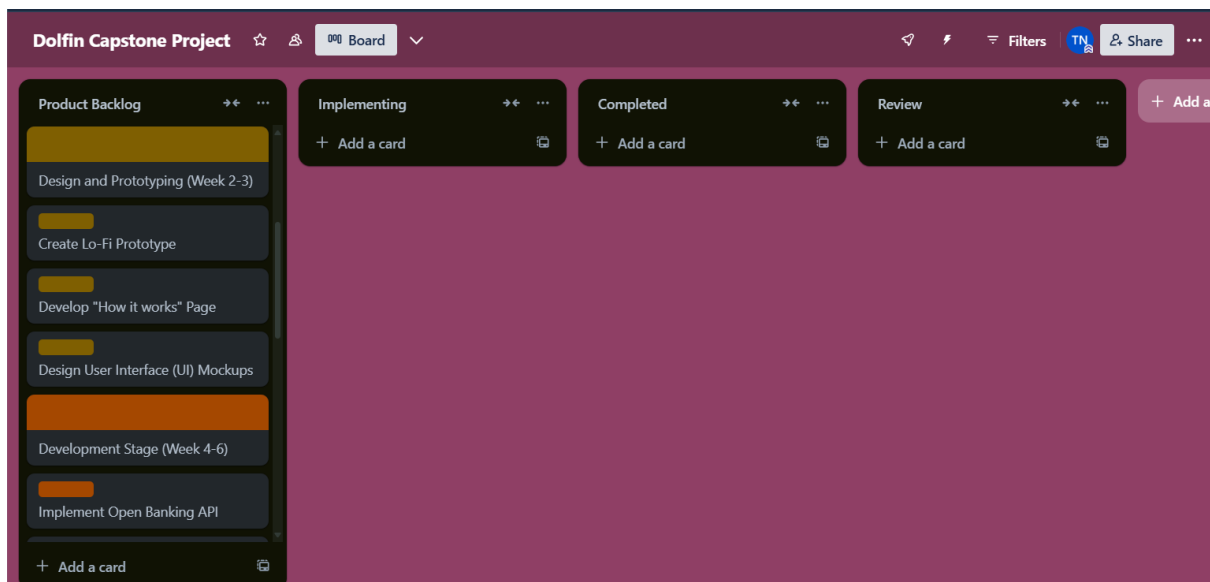
Completed

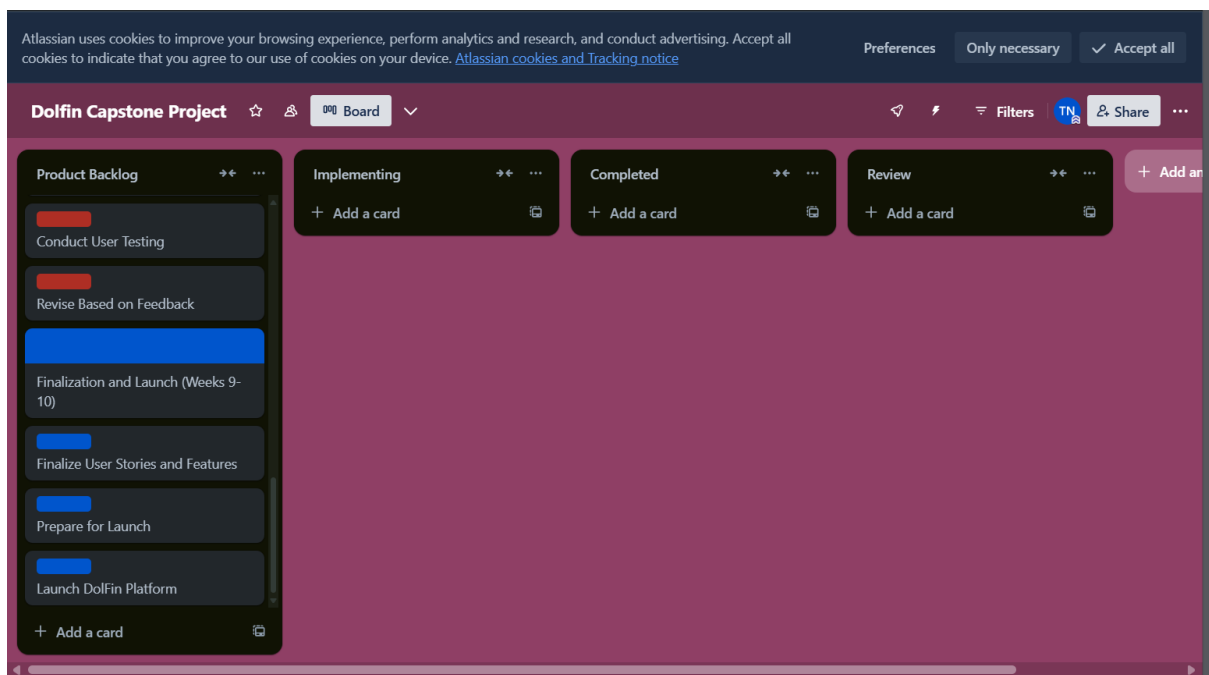
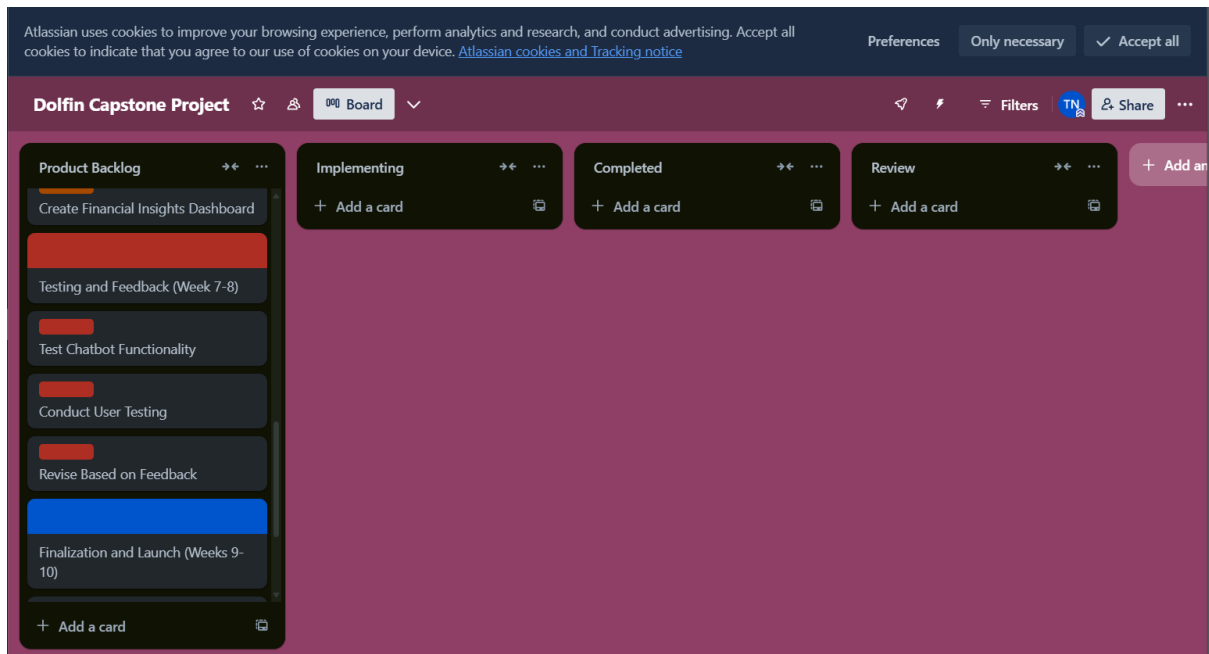
Add a card

Review

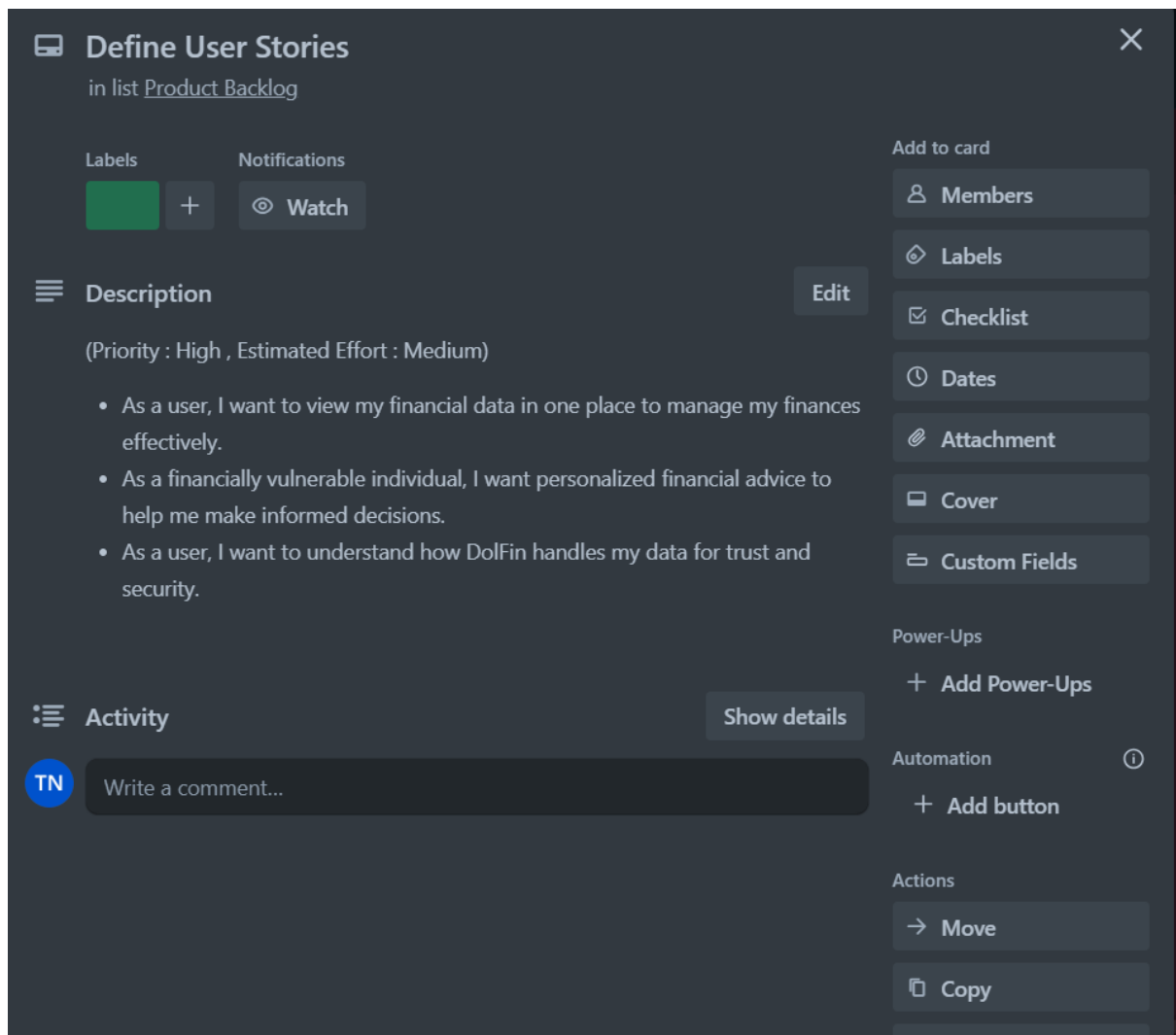
Add a card

Add a card



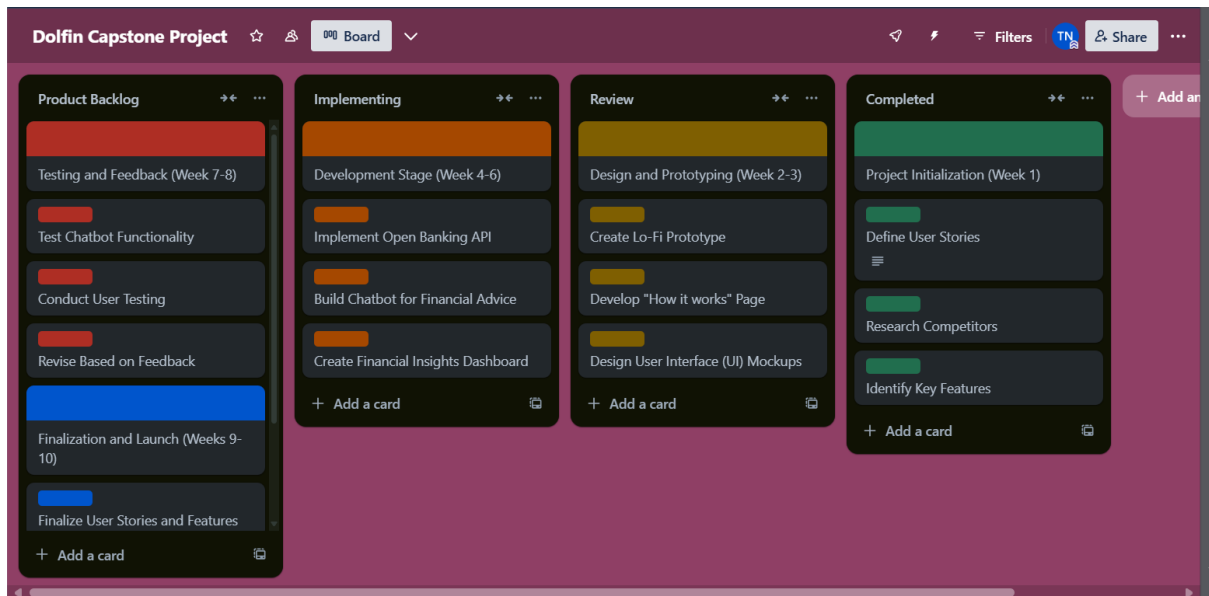


For example, if we want to see the details of tasks and subtasks of each sprint we just simply click into the details of that task, such as the **Define User Stories** task



So that other team members know exactly what their team does as well as their specific jobs too.

And if one of the Sprints is being implemented , completed or even reviewed we just simply move the Sprint card to one of appropriate columns. For example



## Sprint 1: Project Initialization (W1)

- **Define User Stories:** Collaborate to create user stories for the target audience (Priority : High , Estimated Effort : Medium)
  - + As a user, I want to view my financial data in one place to manage my finances effectively.
  - + As a financially vulnerable individual, I want personalized financial advice to help me make informed decisions.
  - + As a user, I want to understand how DolFin handles my data for trust and security.
- **Research Competitors :** Analyse existing fintech platforms for insights. (Priority : Medium , Estimated Effort: Low)
  - + Identify 3-5 main competitors.
  - + List features they offer.
  - + Analyse user feedback from reviews.
- **Identify Key Features:** Outline essential features based on user needs. (Priority : High , Estimated Effort: Medium)
  - + Conduct brainstorming session.
  - + Rank features by user importance.
  - + Document key feature list.

## Sprint 2: Design and Prototyping (W2-3)

- **Create Lo-Fi Prototype:** Develop a low-fidelity prototype of the platform. (Priority : High , Estimated Effort : Medium)

- + Sketch main screens.
- + Create wireframes using a prototyping tool.
- + Gather feedback on the prototype.
- **Develop "How it Works" Page:** Draft content to explain platform operations  
(Priority : Medium , Estimated Effort : Medium)
  - + Outline key points to cover.
  - + Write draft content.
  - + Design visuals to complement the text.
- **Design User Interface (UI) Mockups:** Create visual designs for the user interface.  
(Priority : High , Estimated Effort : High)
  - + Create mockups for key screens.
  - + Ensure accessibility features are included.
  - + Conduct usability tests on mockups.

### **Sprint 3: Development (W4-6)**

- **Implement Open Banking API:** Integrate APIs to access user financial data.  
(Priority : High , Estimated Effort : High)
  - + Research suitable open banking APIs.
  - + Implement API integration.
  - + Test data retrieval functionality.
- **Build Chatbot for Financial Advice:** Develop a chatbot for user interactions.  
(Priority : High , Estimated Effort : High)
  - + Define chatbot capabilities.
  - + Create conversation flows.
  - + Integrate chatbot with user interface.
- **Create Financial Insights Dashboard:** Develop visual analytics feature.  
(Priority : High , Estimated Effort : High)
  - + Design dashboard layout.
  - + Integrate data visualization tools.
  - + Ensure real-time data updates.

## **Sprint 4: Testing and Feedback (W7-8)**

- **Test Chatbot Functionality:** Verify chatbot accuracy and usability.  
(Priority : High , Estimated Effort : Medium)
  - + Develop test cases for chatbot interactions.
  - + Conduct user testing sessions.
  - + Gather and analyze feedback.
- **Conduct User Testing:** Gather feedback from initial users to improve features.  
(Priority : High , Estimated Effort : Medium)
  - + Recruit test users.
  - + Facilitate testing sessions.
  - + Document user feedback and insights.
- **Revise Based on Feedback:** Make adjustments based on user insights.  
(Priority : High , Estimated Effort : Medium)
  - + Review feedback findings.
  - + Prioritize necessary changes.
  - + Implement revisions.

## **Sprint 5: Finalization and Launch (W 9-10)**

- **Finalize User Stories and Features:** Ensure all user stories are addressed and features are ready.  
(Priority : High , Estimated Effort : Medium)
  - + Review and confirm completed user stories.
  - + Check feature readiness.
  - + Prepare for launch checklist.
- **Prepare for Launch:** Final checks and preparations for platform launch.  
(Priority : High , Estimated Effort : Medium)
  - + Conduct final testing.
  - + Create user documentation.
  - + Develop marketing materials for launch.
- **Launch DolFin Platform:** Officially release the platform to users.  
(Priority : High , Estimated Effort : Medium)

- + Execute launch strategy.
- + Monitor user feedback post-launch.
- + Plan for future updates and support.

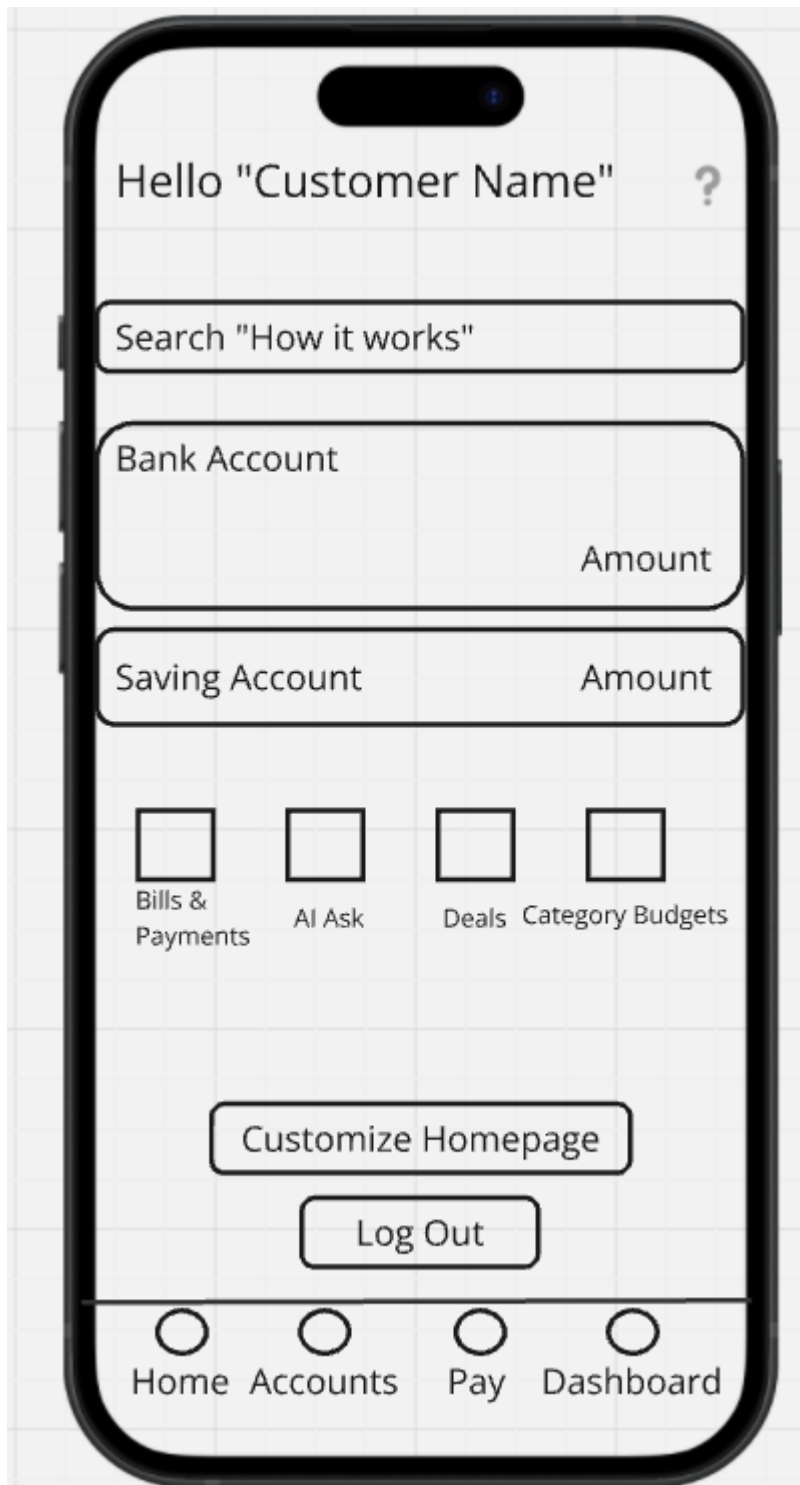
This outline includes prioritized features, estimated efforts, and user stories for each card and subtask of the DolFin project.

### **Lo-Fi Prototype**

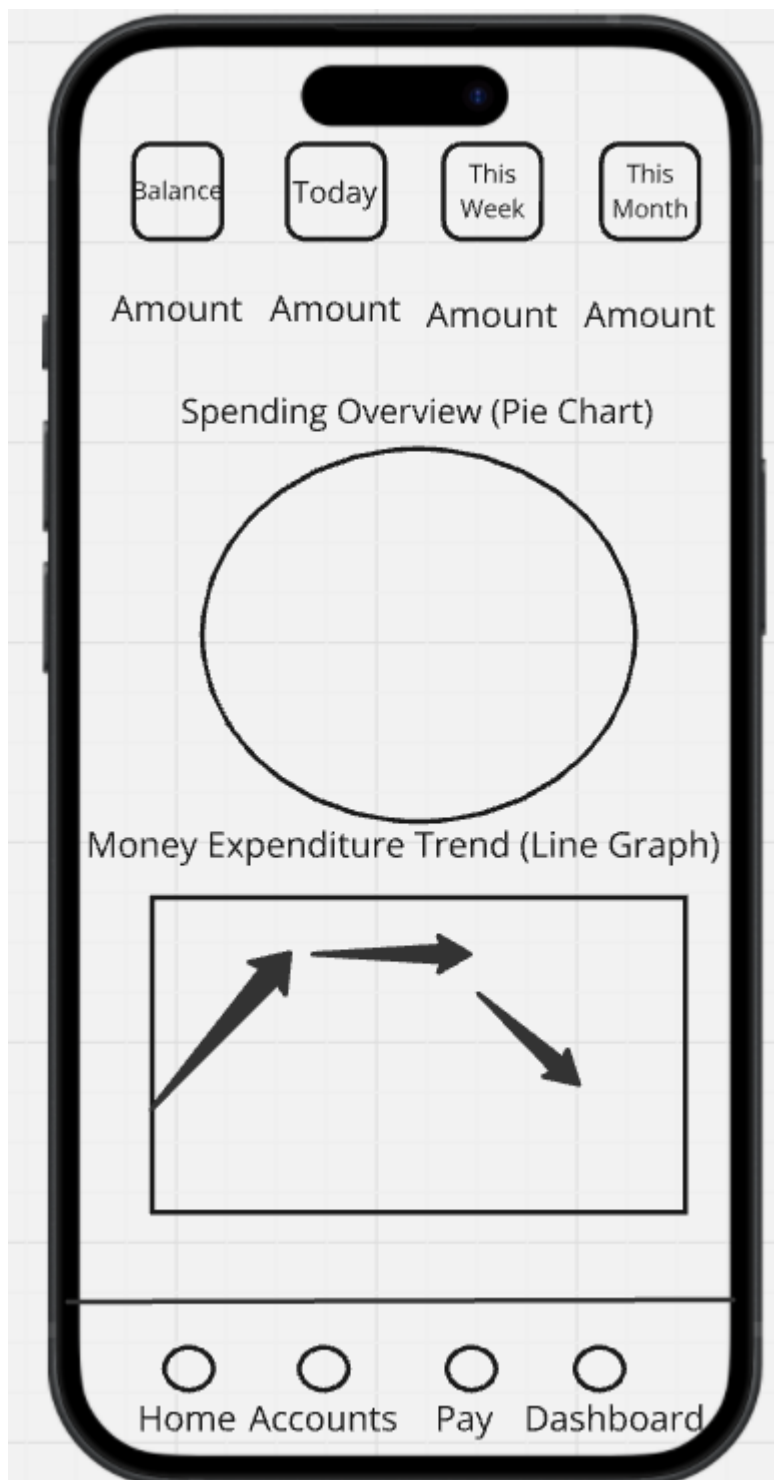
Since many users access fintech applications on mobile devices so we will implement the design for smart phones.

### **Home Page**

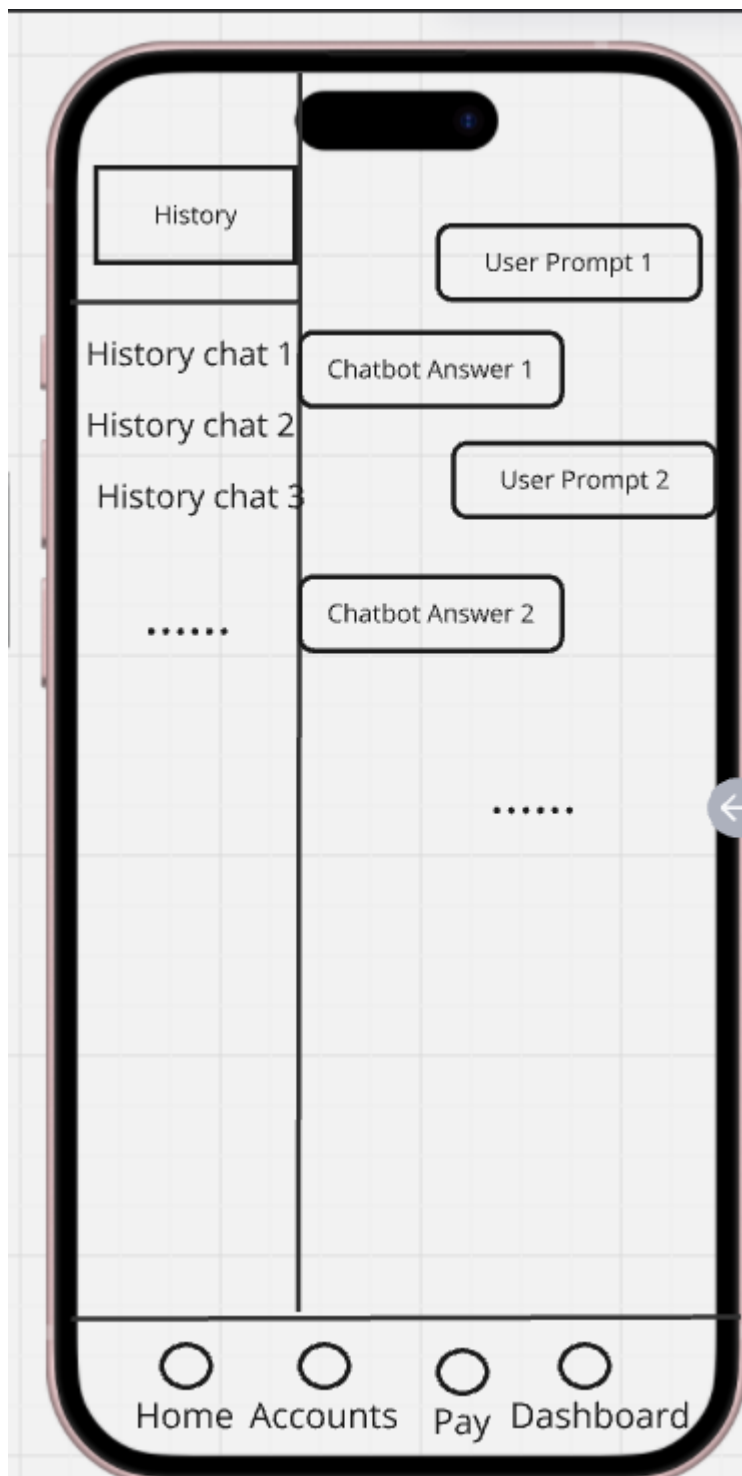




**Dashboard**



Chatbot



Overall

## Low-Fidelity Prototype of DolFin

