


Contextual Inquiry - Team 2 (CSC 554 - HCI)

This form is for the purpose of contextual inquiry regarding the project - **WiseWal.ai**, for the course CSC 554 - Human Computer Interaction. Please fill out the form below to participate.

ymuppall2@ncsu.edu [Switch account](#)



 Not shared

* Indicates required question

Do you agree to participate in this survey? *

☐ Yes

☐ No



Please select your appropriate age group *

- ☐ 4 - 12
- ☐ 13 - 19
- ☐ 20 - 35
- ☐ 35 - 50
- ☐ 50 - 65
- ☐ 65 and above

Please select your current employment status *

- ☐ Employed
- ☐ Non - employed
- ☐ Retired

Please select your income range per annum, as applicable *

- ☐ \$25,000 to \$34,999
- ☐ \$35,000 to \$49,999
- ☐ \$50,000 to \$74,999
- ☐ \$75,000 to \$99,999
- ☐ \$1,00,000 and above



What are your frequent/major expenditure categories? Please select all that apply *

- ☐ Shopping
- ☐ Commuting
- ☐ Restaurants
- ☐ Vacation
- ☐ Healthcare
- ☐ Other:

Do you currently have any loans? *

- ☐ Yes
- ☐ No

If yes, what type of loans are you indebted to? Please select all that apply *

- ☐ Home Loan
- ☐ Educational Loan
- ☐ Car Loan
- ☐ Other:

How are you currently managing your finances? Please give a brief response how you are keeping a track of the inflow and outflow of your finances. *

Your answer



Do you use any budgeting hack to save money? If yes, please describe. If no, please type as "N/A" *

Your answer

How do you handle unexpected expenses, and do you have a strategy in place for building an emergency fund?

Your answer

Whom do you currently seek financial advice from ? Please select all that apply *

- ☐ I have a personal financial advisor
- ☐ I use an financial advising application
- ☐ I rely on relevant advices on social media platfroms
- ☐ Other:

How do you currently stay informed about financial trends, investment opportunities, or money-saving strategies? Please select all that apply *

- ☐ Social media platforms
- ☐ Newspapers and Magazines
- ☐ I have a financial guider app, which gives updates
- ☐ Other:



Please brief about the challenges that you are facing in the routine of managing your finances right now *

Your answer

On a scale of 1 - 10, rate the need for an external application to manage your finances. *

1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Are you currently using any savings/expense tracker application? *

- ☐ Yes
- ☐ No

If yes, how well does the expense tracker app let you set things up based on your preferences and financial plans? Please rate on a scale of 1 - 10

1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



If you are using an application, what are the aspects of the app that you like the most? Please select all that apply. *

- ☐ Interactive and friendly user interface
- ☐ Short tutorials
- ☐ Ease of setting up things
- ☐ Ease of updating details about your finances
- ☐ Feedback and customer support
- ☐ N/A - I don't use an app
- ☐ Other:

What are the aspects of the app that you don't like? (If you are not using an app, please type "N/A") *

Your answer

On average, how much time per week do you spend using the application for financial management? *

- ☐ Less than 5 hours
- ☐ 5 - 10 hours
- ☐ 11 - 15 hours
- ☐ More than 15 hours
- ☐ N/A - I don't use an app



Please select all of the applications which you may have used among the ones listed below: *

- ☐ Divvy
- ☐ Ramp
- ☐ Everlance
- ☐ Expensify
- ☐ TravelBank
- ☐ N/A - I have never used any expense tracking apps
- ☐ Other:

On a scale of 1 - 10, how useful would it be to have an external application with AI integration to provide financial guidance. *

1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Have you used any applications that provide AI curated financial advice? *

- ☐ Yes
- ☐ No

If yes, did it help you to reach your financial goals or not. Please brief on how it helped or why it didn't. (Please type "N/A" if you haven't used any such apps) *

Your answer



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