

Budget Pal

Luis Marte

Project overview



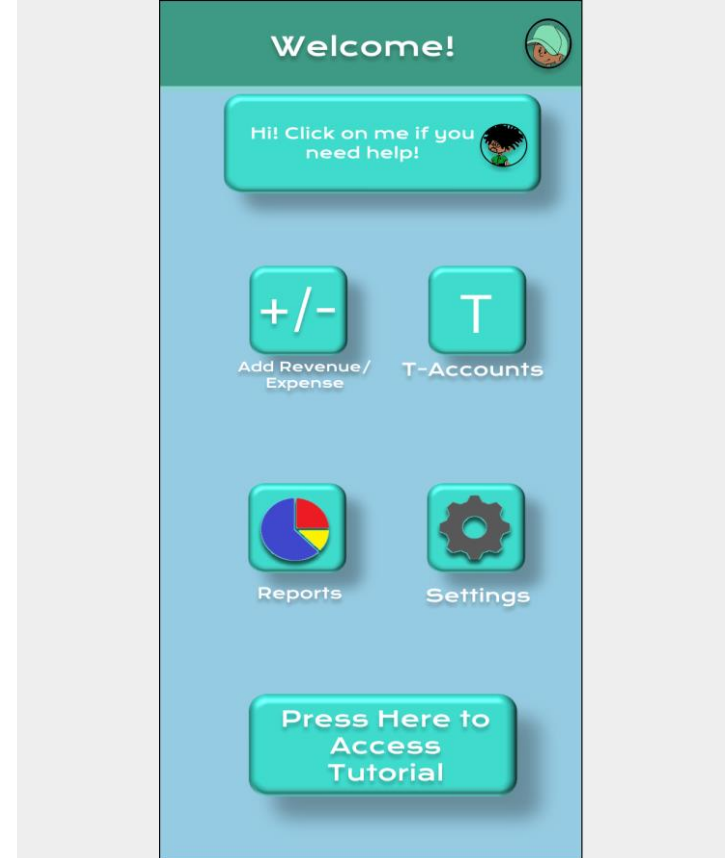
The product:

The name of the project is Budget Pal. The purpose of this project was to help individuals as well as businesses bookkeep their finances and create budgets



Project duration:

I have worked on this project from April 28th to May 17th.



Project overview



The problem:

2 problems I was trying to solve include the following: maintaining and keeping proper records of finances. The second was creating and building a possible budget based on financial status



The goal:

When I created this project, I made it my intention to allow users to understand how and where the money they spent and accumulated would go. In addition, I wanted to create the ability for users to have the option to plan a budget tailored to their needs and wants

Project overview



My role:

I was the lead UX designer, UX researcher, etc.



Responsibilities:

My responsibilities would include: wireframing, prototyping and user research.

Understanding the user

- User research
- Personas
- Problem statements
- User journey maps

User research: summary



I spent a great deal of time researching the ease of use for this project; I would reach out to users of all ages and backgrounds to test the prototype for this project. I wanted to see if the users were able to navigate through the app with ease while reaching certain designated pages via user flow

User research: pain points

1

Font was too small

Some users had a hard time navigating through my app because the font was too small. I adjusted the font size to make words easier to read

2

Reports section was not shown to be interactive

I asked users to access the detailed reports, but they were not aware that the graphs themselves were interactive, so I added a call to action button to let them know a detailed report was accessible

3

Back kept going to Homepage

Users kept going back to the homepage after pressing the bak button; they couldn't return to previous page. I changed the button to be able to go to the previous page

4

No tutorial or guide

One of the users had a difficult time navigating the app on their own; they didn't know what to do or how, so I created a tutorial page to guide users on how to use the app.

Persona: Charlie

Problem statement:

Charlie is a spender who needs help budgeting and track spending because he forgets where his money is going.



Charlie

Age: 36

Education: Master's in Law

Hometown: Boston, MA

Family: 2 Kids, 1 Wife

Occupation: Lawyer

"No matter who you are or where you're from, there are multiple ways to reach the same goal."

Goals

- Attend EDM concerts all over the world.
- Open up own law firm.
- Save money better.

Frustrations

- Not being able to save money.
- Being unable to track spending
- Spending more time at work than at home.

Charlie has been a lawyer at a prestigious law firm in Boston; he is highly recognized by his peers and community as a great influence, and is supported by his loving wife and 2 daughters. Charlie enjoys donating to local stores, events and occasional fundraisers. Charlie realizes that he does not track his money well and needs help.

User journey map

People lose money all the time to bills, subscriptions and memberships to apps they do not remember signing up for. It's a common occurrence that should not be left unresolved.

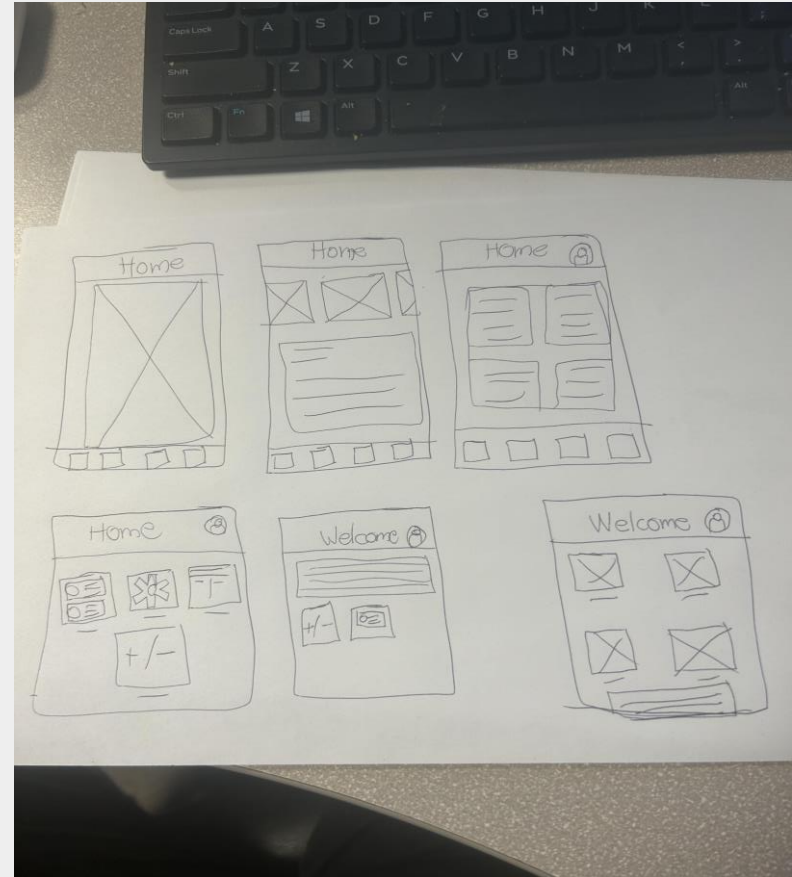
Persona: Charlie

Goal: Save Money

ACTION	Cut Spending	Open Savings Account	Be Thrifty	Create Budget Plan	Download Budgeting App
TASK LIST	Tasks A. Manage subscriptions B. Limit daily spending C. Monitor bank account	Tasks A. Deposit money B. Visit bank C. Not touch money	Tasks A. Shop for less expensive brands B. Pay less for services that can be done on own C. Do laundry at home	Tasks A. List expenses incurred monthly B. write amount of money allowed to spend weekly or monthly C. Document budget plan	Tasks A. Find app that focuses on creating a budget plan B. Research for apps that provide helpful resources C. Download and test apps that help make a budget easier to control
FEELING ADJECTIVE	Charlie is not used to conserving money	Charlie feels better having a savings account	Charlie is used to being serviced for certain things so he feels weird	Charlie feels hopeful	Charlie is focused but excited
IMPROVEMENT OPPORTUNITIES	Charlie needs a ledger or notebook to keep track of money	Charlie needs a friend to encourage saving	Charlie must adopt the DIY concept	Charlie should Dedicate more time to plan an effective budget.	Charlie can keep searching for more apps that can be easier to use

Paper wireframes

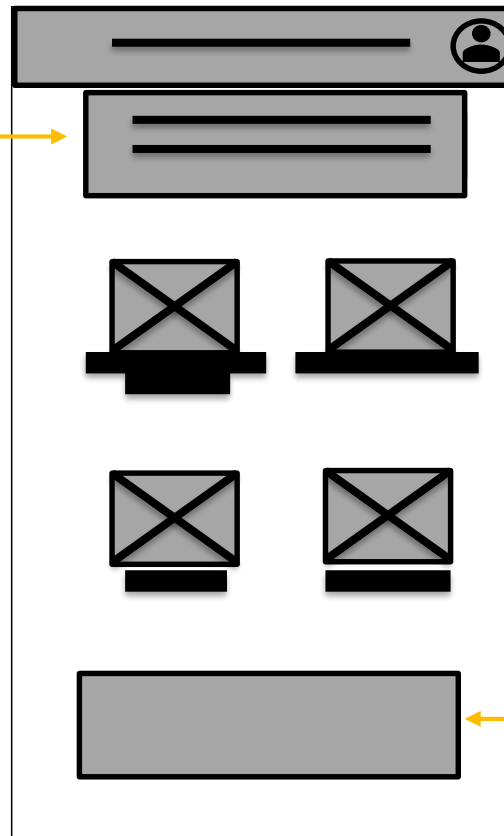
The main focus of designing the homepage was to make it easier to find the pages the user wishes to find



Digital wireframes

[Your notes about goals
and thought process]

This is one of
the features
that allows the
user to chat
with the bot
when they
need help
navigating the
app

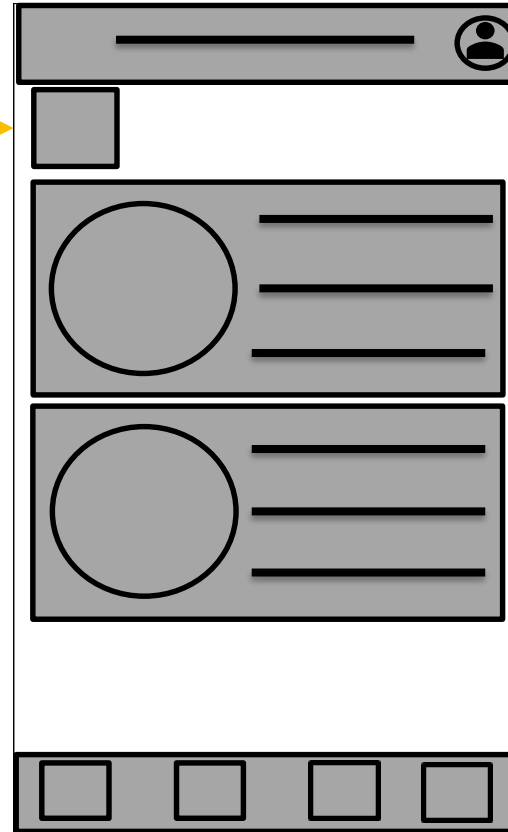


This tutorial
Helps users
use the app
and gain full
knowledge of
bookkeeping
and budgeting

Digital wireframes

The reports section will be among the most important sections because this will be the key to money tracking and planning budgets.

This button will represent the homepage



These are the reports that will be interactive later on.

Usability study: findings

Write a short introduction to the usability studies you conducted and your findings.

Round 1 findings

- 1 App was easy to navigate
- 2 Texts were too small
- 3 Reports weren't known to be interactive

Round 2 findings

- 1 Tutorial was added
- 2 Chatbot was easy to find
- 3 Reports

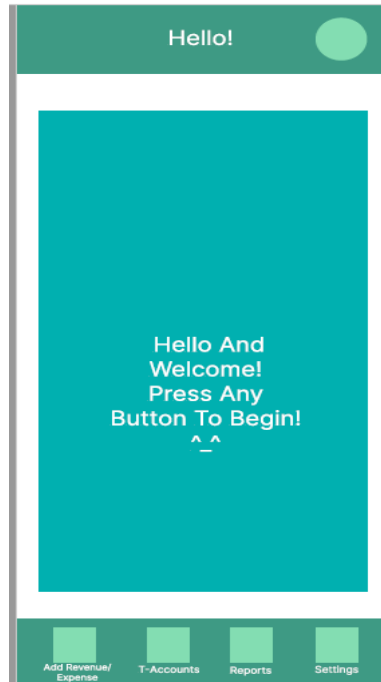
Refining the design

- Mockups
- High-fidelity prototype
- Accessibility

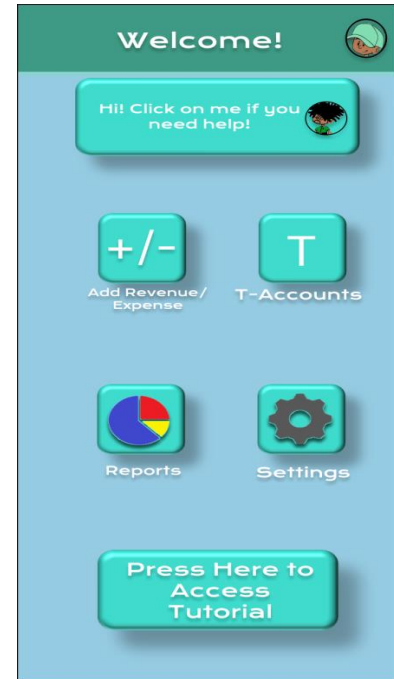
Mockups

I wanted all sections to be easily visible for those hard of seeing

Before usability study



After usability study



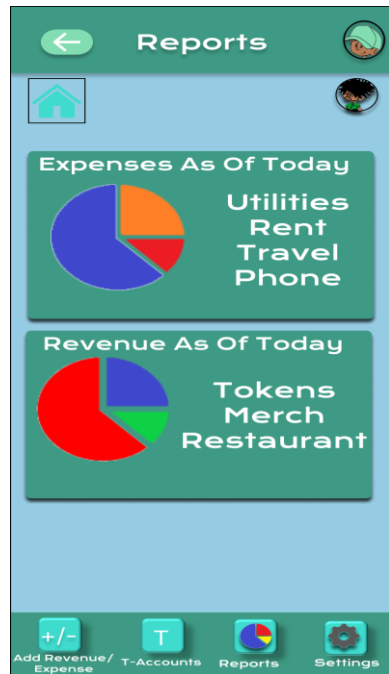
Mockups

Due to the flatness of the report buttons, users didn't realize it was interactive. Adding elevation usually helps show something can be pressed

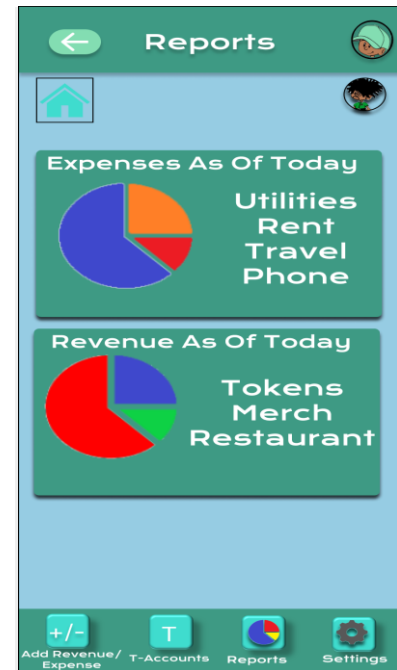
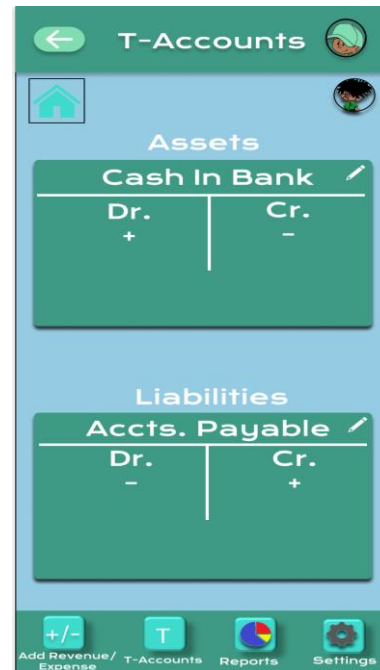
Before usability study



After usability study



Mockups



High-fidelity prototype

<https://www.figma.com/file/vuuaKw7zZd5GHdWSRwOoOf/Untitled?type=design&node-id=39-2&t=xjjUTrh7dls2RE1Q-0>



Accessibility considerations

1

I would like to add an audio feature to command the app via voice

2

I would like to apply a magnifying app for those hard of seeing

3

I would like to allow users to add hotkeys or shortcuts to wherever they wish to navigate in the app

Going forward

- Takeaways
- Next steps

Takeaways



Impact:

I would like to think that this app's design is easy on the eyes, providing a smooth service while making sure the most important features are highlighted. The most important thing to me is taking something as complex as bookkeeping and simplify it.



What I learned:

I learned that a designer's job is never finished; there will always be someone who will agree with the interface, and one who will disagree. I learned the importance of not taking any criticism in a negative manner. I will take what I've learned from designing this app and utilize it to make visually appealing designs for all kinds.

Next steps

1

I would like to take this app and create a website for it. There's only so much an app can do. Not all the information can be provided in the app.

2

I hope to make this an actual app for users to use and learn. There isn't many people willing to teach the ways of the financial world as well as economics

3

I want to make this app one of the easiest apps out to use, as well as make people feel like they've come across someone who can relate to their financial struggles. We all struggle and sometimes we feel nobody would understand. That's what Budget Pal is for.

Let's connect!



I'm a small time designer in training with giant dreams of making my wishes and the wishes of others come true. Let's make them come true together!

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Please email for phone number

New York City

Thank you!

(And yes, I created
this guy)

