

Case Study Finliti

Name of Product

My Finliti

Company Overview

Finliti aims to raise your awareness in financial decision-making. They have brought us in to help design their first product application, My Finliti.

My Role

UX Researcher

UI Designer

Timeline

February 10th to April 10

Capacity

Team of 4

Programs

Figma

Overview and Identity

Finliti brought me alongside two other designers from the Springboard curriculum project into this initiative to bring a platform to life. Finliti is currently at the point of operations where they have a secure network via Facebook while trying to expand into other avenues of platforms. The business has made it clear, however, that the product they look to introduce to these networks is an educational gamification-simulator to learn about investing.

Solution

A modified design sprint was refined to accustom all our time zone differences and schedules as the most efficient approach to unite all minds together while receiving input from the founder and CTO. The schedule would go as follows:

Stage 1 - Map

Stage 2 - Sketch

Stage 3 - Decide

Stage 4 - Wireframe

Stage 5 - Prototyping

Stage 6 - User Testing

Stage 7 - Insights

Process

Stage 1

We took the time to ask questions and map out our problems to what Finliti needed in their platform.

How might we make investments fun?

Break down content to be manageable and bite-size?

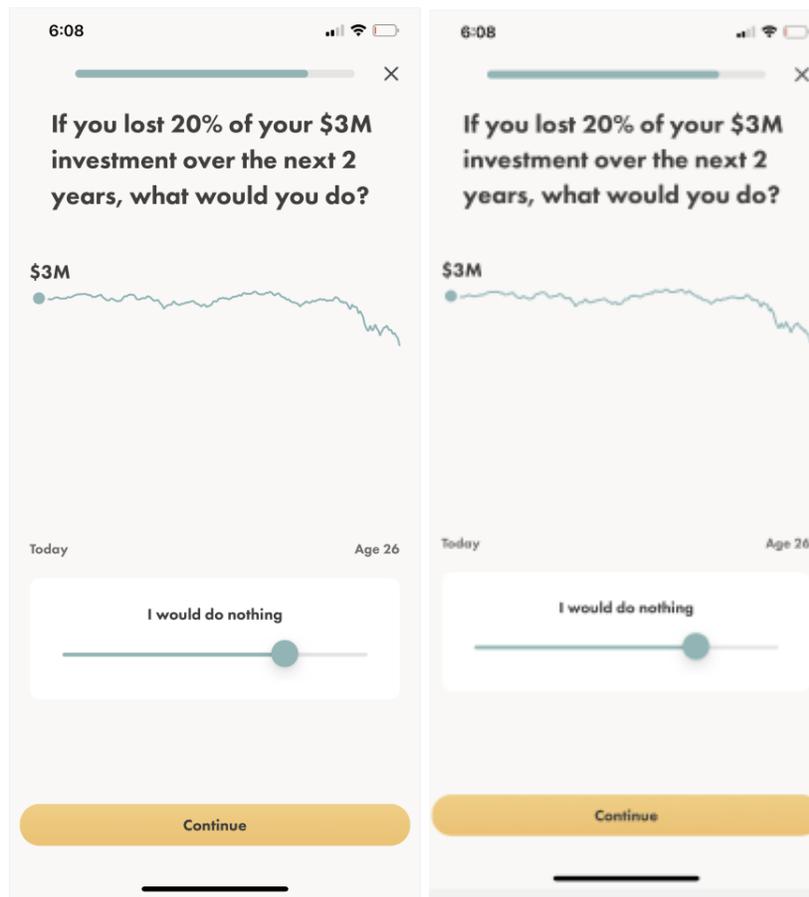
Personalize the user's financial journey towards becoming a better investor?

It came to an agreement we had to solve and create a design for the use case for Finliti, as a product.

Day 2

We found references and demos we thought were interesting, using connection and base to our idea.

Inspirations from:



Wealthsimple: Metrics and scenario screens

Wealthsimple provided a strong layout and direction to understand how to present scenarios and collect data through slider modules. We wanted to implement similar ideas.



Explore This Type

- Introduction
- Strengths & Weaknesses
- Romantic Relationships
- Friendships
- Parenthood
- Career Paths
- Workplace Habits
- Conclusion
- Premium Profile

Introduction

WHO IS A PROTAGONIST (ENFJ)?

A **Protagonist (ENFJ)** is a person with the Extroverted, Intuitive, Feeling, and Judging personality traits. These warm, forthright types love helping others, and they tend to have strong ideas and values. They back their perspective with the creative energy to achieve their goals.

Everything you do right now ripples outward and affects everyone. Your posture can shine your heart or transmit anxiety. Your breath can radiate love or muddy the room in depression. Your glance can awaken joy. Your words can inspire

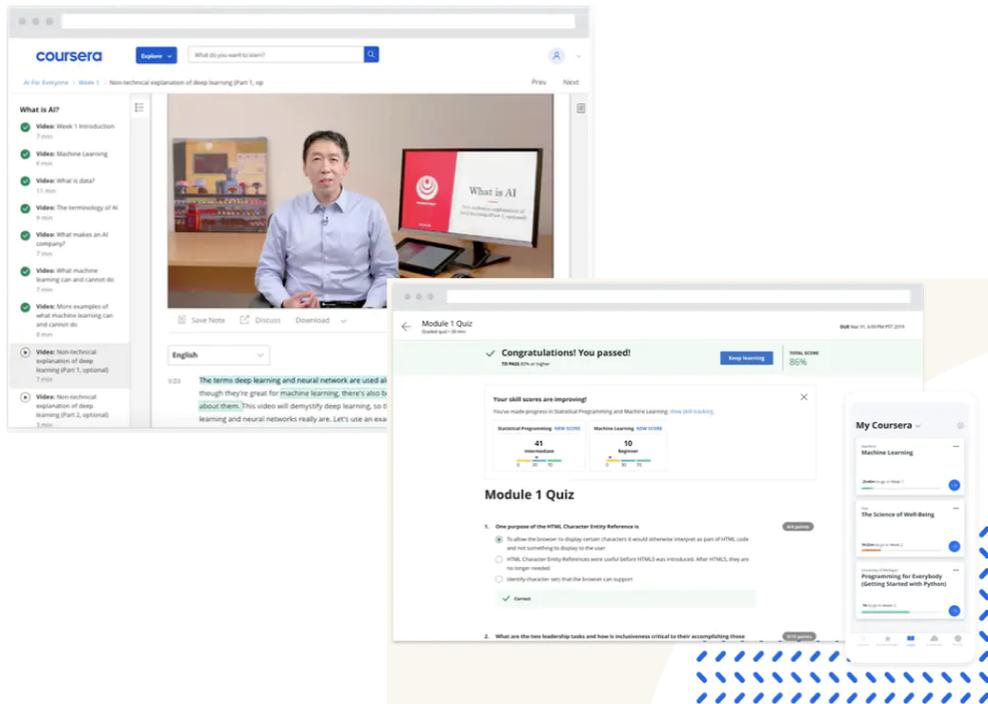
New Here?

Take the Test

Already have your results? Log in.

16personalities: Overview for questionnaire

16personalities was a strong foundation to understand how to present personalities through quizzes and questions for the user. Personalization was broken down into subgenres.



Coursera: Missions screen

Coursera provides a learning fundamental that was necessary for Finiti's vision for their experience.

Day 3

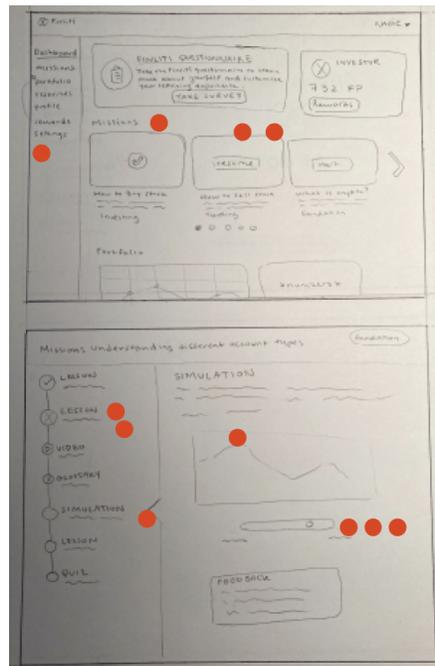
We decided based on votes on our the references and ideas to go with a foundation that consisted of:

1) Questionnaire flow



We have chosen to present Finliti's key feature of Investor Profiles, a profile assigned after the Questionnaire flow.

2) Dashboard + Missions overview and flow



The Dashboard was chosen as a critical screen as it was a red traffic route and essential screen that transitions from the sign up (Guest user flow) to sign in (Member user flow).

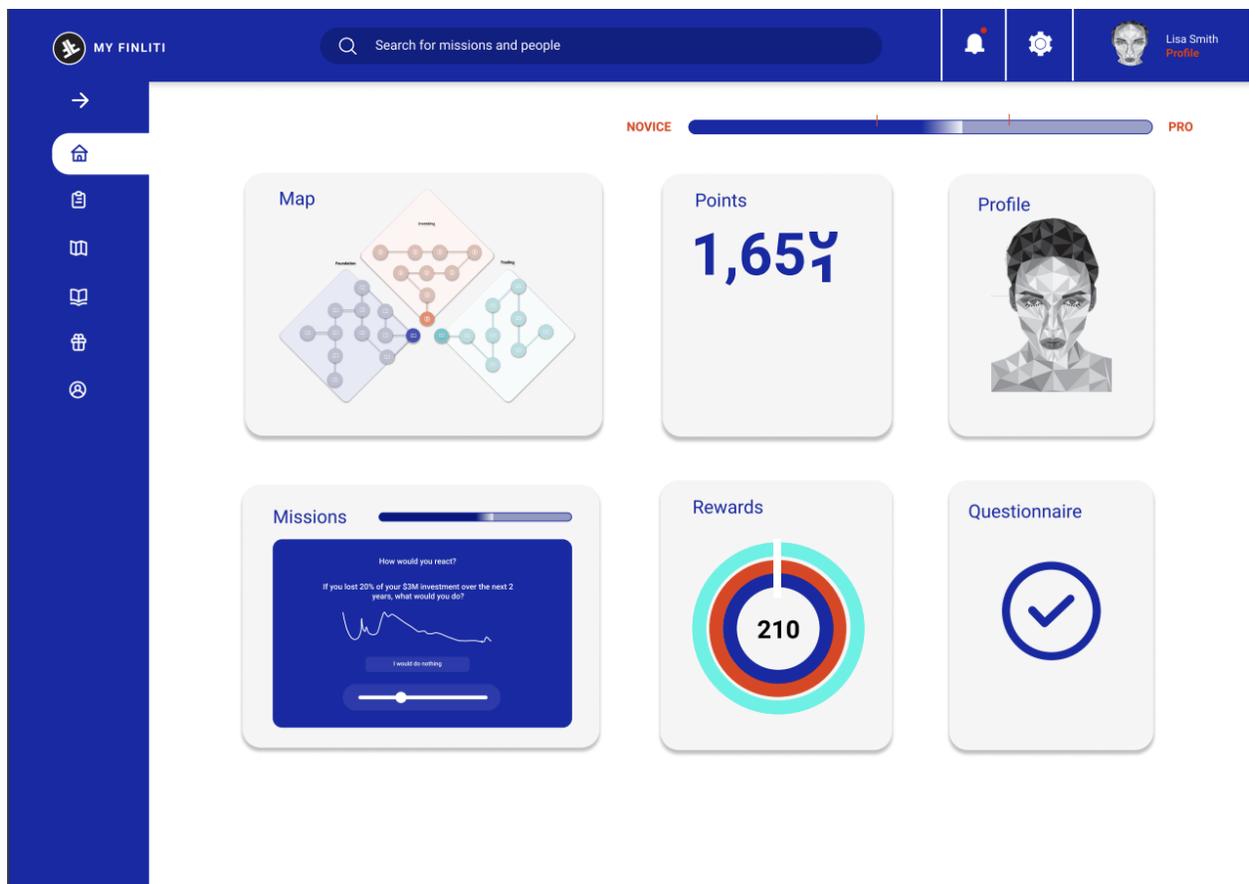
The Missions screen is an essential key feature in Finliti to present concepts and modules of information for the profile. We realized we would need to create a mock Mission of steps to deliver information and modules.v

Day 4

We took the time to develop wireframes from our sketches and references. We're excited to come up with a foundation for Finliti to scale and expand in any way possible.

Dashboard screen:

This screen would be after the user logs in or signs up. They now enter, My Finliti, a unique experience featuring a dashboard and user modes they can explore.



Questionnaire:

The questionnaire was a narrative of screens meant to give users trying to demo personalization through choice. As they answer, their avatar will develop.

The image displays two screenshots of the MY FINLITI mobile application interface. The top screenshot shows the 'Discover Your Investor Profile' screen. The bottom screenshot shows a questionnaire screen titled 'Investor Profile Questionnaire' with a progress indicator and a developing avatar.

MY FINLITI | Search for missions and people | [Notifications] [Settings] [Profile: Lisa Smith]

Discover Your Investor Profile

Finliti delivers a wealth of investment knowledge by discovering the "emotional you" factor, with 3 investor profiles.

- The Protector**
- The Opportunist**
- The Trailblazer**

Understanding your investor personality allows our experienced team to deliver the most useful and effective information. Join a community of like-minded warriors: defeat your "money" fears together.

DISCOVERY QUESTIONNAIRE

Your information is confidential and secure and will not be shared with any third parties.

MY FINLITI | Search for missions and people | [Notifications] [Settings] [Profile: Lisa Smith]

Investor Profile Questionnaire

Demographics | Beliefs & Behaviors | Personality

What is your gender?

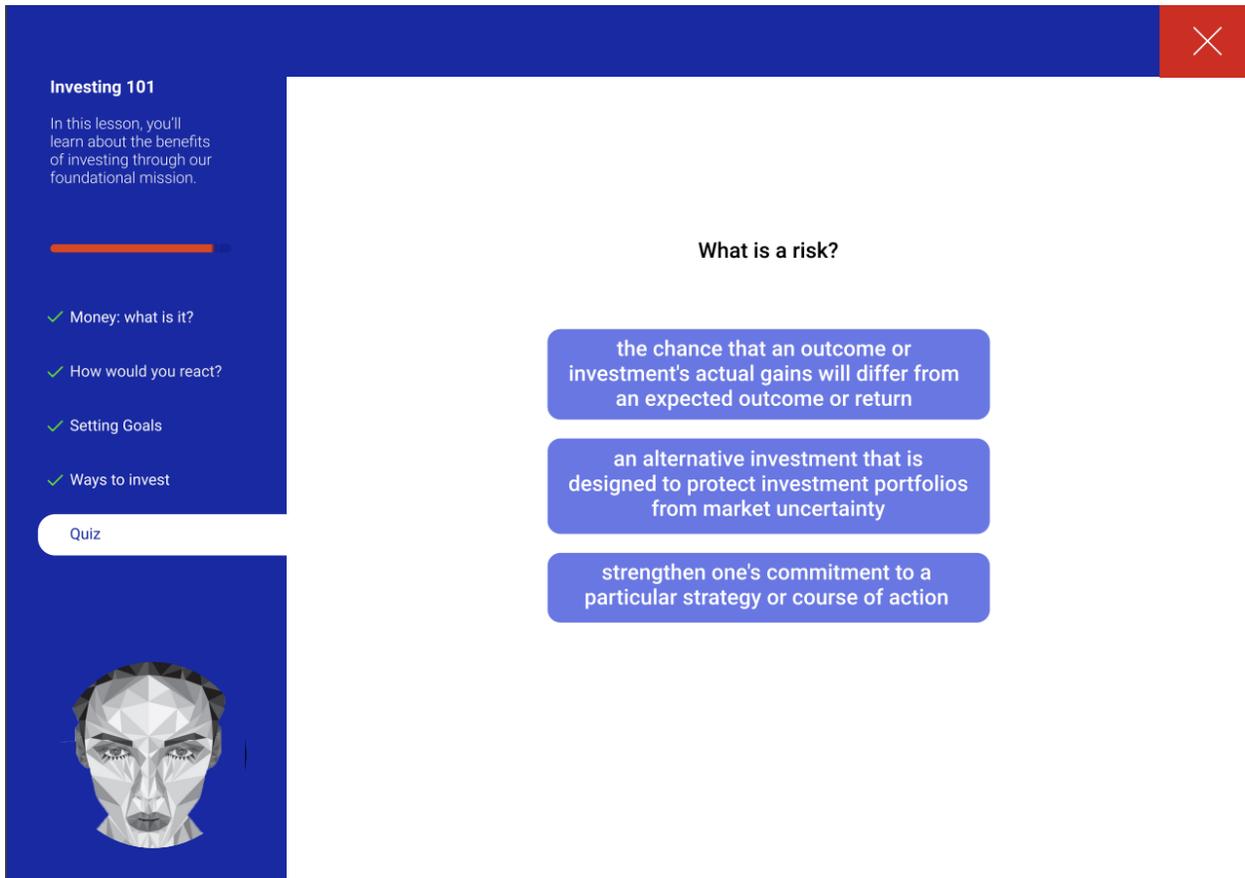
- Male
- Female
- Other
- Prefer not to say

← [Progress Bar] →

[Avatar]

Missions:

The flow for Missions is meant to create a sense of narrative when learning.



The screenshot shows a learning interface with a dark blue header and sidebar. The sidebar on the left contains the following elements:

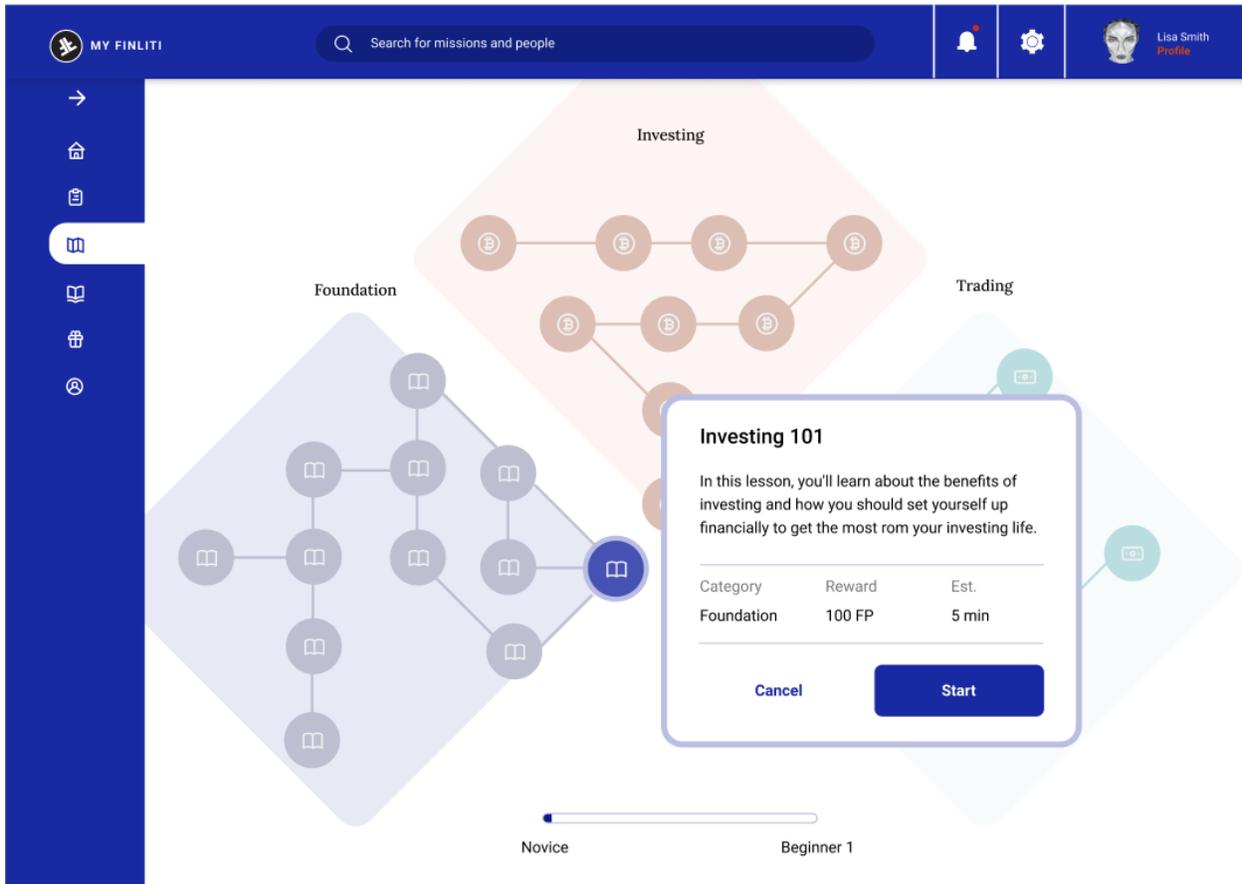
- Investing 101**
- In this lesson, you'll learn about the benefits of investing through our foundational mission.
- A progress bar with an orange segment.
- A list of completed topics, each with a green checkmark:
 - Money: what is it?
 - How would you react?
 - Setting Goals
 - Ways to invest
- A white button labeled "Quiz".
- A stylized, low-poly illustration of a person's face.

The main content area on the right features a red close button (an 'X' icon) in the top right corner. The central heading is "What is a risk?". Below this heading are three blue rounded rectangular boxes, each containing a definition:

- the chance that an outcome or investment's actual gains will differ from an expected outcome or return
- an alternative investment that is designed to protect investment portfolios from market uncertainty
- strengthen one's commitment to a particular strategy or course of action

Map:

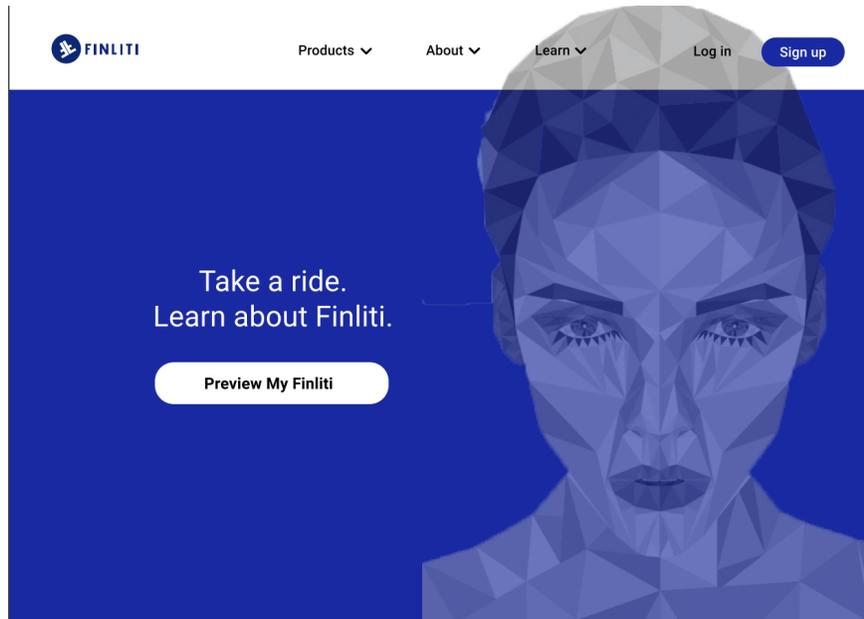
The map itself was a separate screen that gives users another perspective of the entering missions and giving more of a visual narrative.



Stage 5:

We spent the week prototyping a demo enough to navigate a free-flowing user flow for a new user and sign up and access the dashboard.

The start home page:



We had developed a working demo featuring. Due to the nature of the project, the demo is unavailable for showing:

- User Flow primary from new user to My Finliti (Dashboard)
- Questionnaire
- Map overview
- Mission set overview

Wrapping Up

The project was handed over to another Springboard team to handle Stages 6 & 7, user testing and insights. An overall great experience with handling scheduling, working collaboratively and communicating across all boards.