

Team Wallus: Medium-Fi Prototype

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Team 3 Members



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Problem

Despite the importance and benefits of financial investment, people shy away from investing due to the lack of confidence, experience, and relevant knowledge.



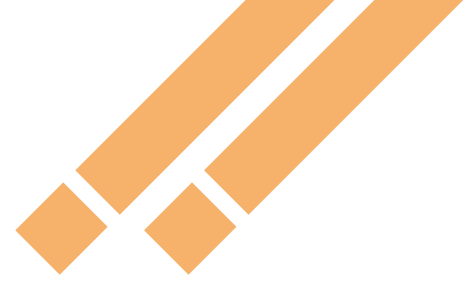
Solution

Encourage investment rookies to grow investment knowledge with friends



Value Proposition

Educate and support investment rookies to gain investment literacy



Values in Design





Embedded Value #1



Inclusion

All users (especially those with little to no experience with investing) find Wallus intuitive, helpful, and inviting

- Groups **equally represent all members** regardless of all prior investments and size of investment
- **Onboarding** procedure is **personalized** and includes **educational** content
- All parts of the app are **hyperlinked to definitions** and include “?” buttons with tutorials to understand what a concept is and how to interact with it
- Explanations of “**what can be next**” are defined at every user decision

Embedded Value #2

Privacy

User information and investments are kept private to only necessary individuals

- User's **investment amount is private**
- The only stocks of a user that will be visible to friends are the ones the user and a **friend have together**
- No investment will be visible to anyone the user is not a friend of

Embedded Value #3

Autonomy

Users have full control of their money

- All features in Wallus will give users the **decision to determine** where their money is invested, in which groups, what amount, and how long the investment is kept
- While Wallus will make recommendations to the user based on preferences, the user has the ultimate decision to invest

Embedded Value #4

Safety

No frauds; user's money is honestly kept where they invest in

- The investments in stocks through Wallus **genuinely mean an investment** into that stock ticker
- Money invested through Wallus is not held by the app and **real-time invested**

Conflicting Values



The two biggest values that might conflict are **inclusion**, so that beginners can be guided through the app, but also **autonomy** so that folks can determine which friend investment groups they should join. By giving users educational resources, curated recommendations, and guidance on best courses of action at each point for a stock, we provide a lot of information that can influence the investing of a user. However, we want to make sure that autonomy of thought is still maintained by the user.

How we will keep the values in check?

Make sure the emphasize that all educational videos are there to build a user's investment context and include in depth reasoning of pro/con for recommendations. This will make sure the app is able to help newbies while also always keeping interpretation open!

Tasks

Simple

Accept invitation to join an investment group.

Moderate

Create an invitation for a friend to join an investment group you are in.

Complex

Use in-app resources to learn about the market and invest in a new stock.

Same as Assignment 5!

Goals & Measures

4





Usability Goals

Goal 1: Approachable

Key Metric: Users were able to understand the interface or find out what it means

Goal 2: Intuitive

Key Metric: Process time & verbal feedback



Usability Goals: Action from A5

1

We learned:

Users with less experience had trouble understanding the market page

2

We learned:

Users are not sure how a new investment can complement their portfolio

3

We learned:

Many features were not clear in their purpose (ie 'Pending Invitations')

1

We progressed by:

Redesigning the Markets page to focus on "Featured" w/ explanation

2

We progressed by:

Add details to the "Accept Invite" screen incl. risk, industry, amount compared to current portfolio

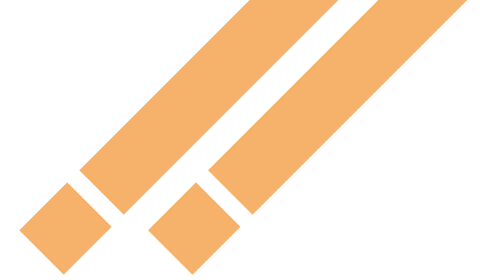
3

We progressed by:

Rethinking pages and wording for each section of the app.

Medium-Fi Prototypes





Link to Figma:

Interactive Prototype

Feedback:

1. Approachable vs. overwhelming
2. Is the purpose of each page accomplished by the design?



**Studio Feedback ->
Action**



**Thank you for joining
us!**

<3 Team Wallus