

Finimize - UX Brief

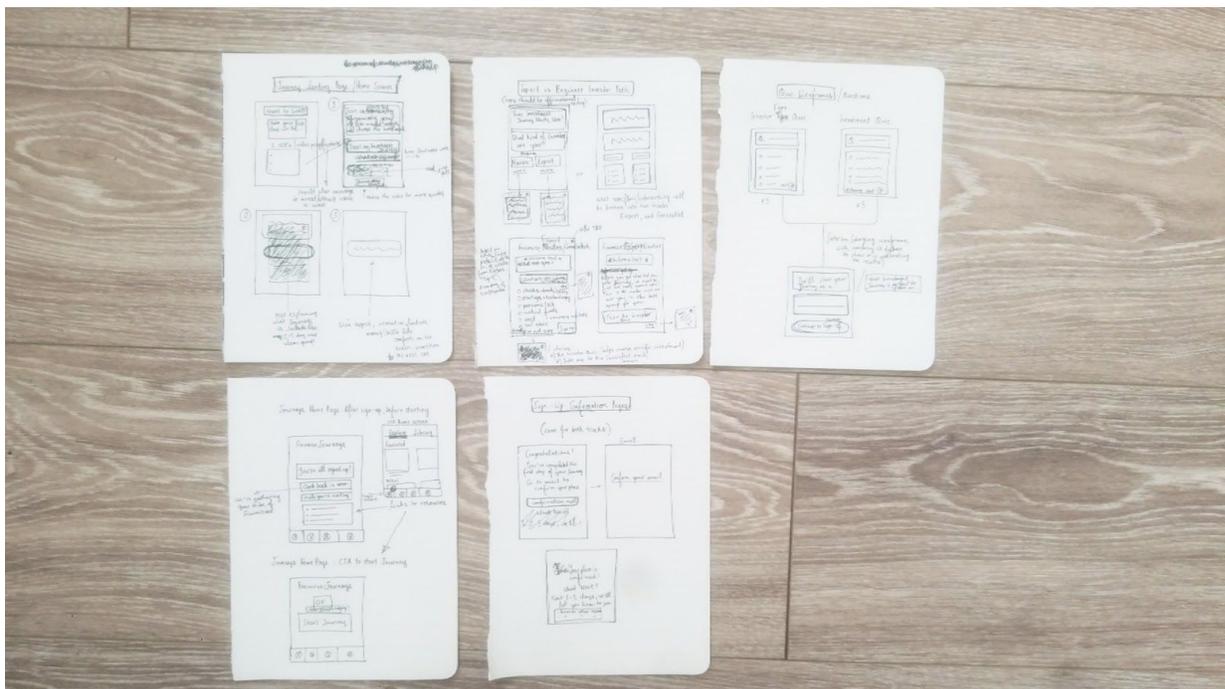
Produce a series of wireframes in a user flow that on-boards a user into a journey including the initial message from the Finimize expert.

Journeys

Journeys is a new beta feature we want to test with premium users. Users will be able to join a Journey (a guided group chat) from the Journeys tab in the app navigation and be grouped with up to 8 other Finimizers and a Finimize expert.

Journeys user flow:

1. User selects Journeys tab from the app navigation and lands on a home screen to get started.
2. User requests access to journeys via CTA.
3. User is informed they are added to a waitlist - they will be emailed when the journey is about to start (typically 2-5 days).
4. Journeys home page becomes active with CTA to start journey once they receive the email telling them the journey has begun.
5. When a user enters the journey (joins the chat group) they are welcomed by the Finimize expert that will get them started on their first pack.



Link to user personas:

<https://d2jt48ltdp5cjc.cloudfront.net/users/34455/uploads/e2db350e-186d-4a7b-8dea-8a496228a535.pdf>

The main engaging features for Journeys to start with:

1. Personalized tracks option.
2. Personalized chat group with like-minded people and a Finimize expert who knows in advance what everyone will be interested in.
3. Quizzes to find out: a) What type of investor they are (Generalist track), or b) What exact investment is right for them/they are interested in. The results of these can be entry points/ice-breakers to the initial group chat intros/convo.
4. Engaging/interactive/responsive feedback sent via email (and through app alerts, if they have a messages section in the Profile) during the interim after sign-up and before launch. This content could be "Journeys prep kit" style, insider extras, or even a chance to submit one question in advance of the chat to the Finimize expert (who could be introduced via email the day before the launch of the chat), which will be answered in the group chat or used as a convo starter. Also could include more info about the alumni group, with options to maybe meet up with alumni in your local city etc (While I was at Blenderbox, Goldman Sachs asked for an app design for the alumni of their Mini MBA program, I put together the proposal and we won the project - so this feature/theme could be something to think about building in the future as part of the app product? Some sort of mini Finance nanodegree which you can access once you've completed Journeys and possibly other similar activities?)

Link to wireframes/rough prototype of 5 User Flow stages:

<https://www.figma.com/file/BaKpORzsB7MSFepuL4iDJWqp/Finimize-Task-User-Flow?node-id=20%3A17>

