

Finimize Task Brainstorming: Journeys

Deliverables

- User Flow/Onboarding
- Wireframes

Goal

- engage a user who wants to start a journey
- convince them to join a journey
- encourage users to be active in the group

3 User Journey Stages

1. Inform about Journeys, convince to take part (2 - 3 wireframes)
2. Sign-up to the waitlist process (3 - 4 wireframes)
3. Starting the Journey and joining/entering the chat group (3 - 4 wireframes, incl. first message from the Finimize expert)

User Personas:

3 types of premium users which would tap/find themselves on this page:

a) A beginner/first-time/generalist investor. This would group like-minded investors in each group, to give it more of a community feel. This would also make the Finimize expert's role more straightforward, as they would have an idea of the audience they are going to be interacting with. It would also make the users feel more at ease and more likely to interact if they feel they are on a similar footing with the rest of the group, ie. if

they didn't have much experience with investing they might feel intimidated if they thought they were joining a group of more savvy investors.

b) Someone who has more experience/knowledge about investing, or wants a challenge, or knows already exactly what type of investment they want to make, just wants to use the chat room as a place to exchange ideas, get advice from others who are thinking of the same investments, and see what the Finimize expert has to say about their ideas/plans.

c) Someone who isn't quite ready to make an investment yet. The landing page for Journeys should offer an option to go and learn more about investing/the market etc. and a prompt leading to other sections of the app where they can browse these packs (although this isn't part of the Journeys user flow, this section with the list of packs could be filterable according to what that user is interested in, to guide/kick start their investment "learning Journey" - and maybe there could be some sort of "bot" or email reminder, which checks back in with that user in a few weeks after they tapped out of the Journey page, asking them do they feel ready to take on a Journey).

N.B. - We are assuming that there are no day traders or professional stock brokers using this feature. Correct me if I am wrong, though!

Context:

Users will be more likely to engage and join a Journey if they feel they will be comfortable & catered to in the particular group they are added to. So having some sort of personalised feature and assurance, eg. "We'll make sure you join a group which meets your investment needs, so you can smash your goals at your own pace. All with the support of an expert Finimzer and awesome Finimize community."

Before signing up to the Journey, they will get the chance to choose their Journey path - the Expert Investor, or Generalist Investor, answering to the needs of each of those two

user personas previously outlined. Each path will contain different features and options. Eg. the Expert Investor path could allow users to choose from a range of Investor options, based on the packs they have already read or on the investment areas they want to focus on (stocks, weed, streetwear, etc); the Generalist Investor path could take a quiz to see what type of investment suits them best, or what kind of investor personality they have, so they can enter the chat with some sort of “tag” or “label,” eg. The Risk Taker Investor, The Data-Driven Investor, The Cautious Investor.

Once the chat has begun, and following the intro message from the Finimize expert, each of the 8 Finimizers could be given the chance to introduce themselves and write a few lines about why they’re here on the chat, what their investment interests are, and what their goals are, before getting started on the 2 week journey.

N.B. - The he user has to wait 2 -5 days between the sign up and the beginning of the Journey chat. We would need to think of some way of keeping them engaged and motivated in the meantime, so it doesn’t pass too quickly through from their minds. If too long a silence elapses between signing up and the Journey beginning, then they might forget about it or decide to opt out once the Journey begins. Possibly a series of emails each day, like a Journey “prep kit,” which outlines the Journey process in more detail, what’s involved, or just some extra investment tips. These emails could be addressed from the Finimize expert who will be running the chat they’ll be part of.

There should be an option also to opt out before the Journey begins (or at any time), so users don’t feel pressured. But there should also be some sort of messaging/communication at the beginning to show that this Journey option is for people genuinely interested in making an investment, and should feel empowered/supported to do so by the Finimize content and experts/community aspect.