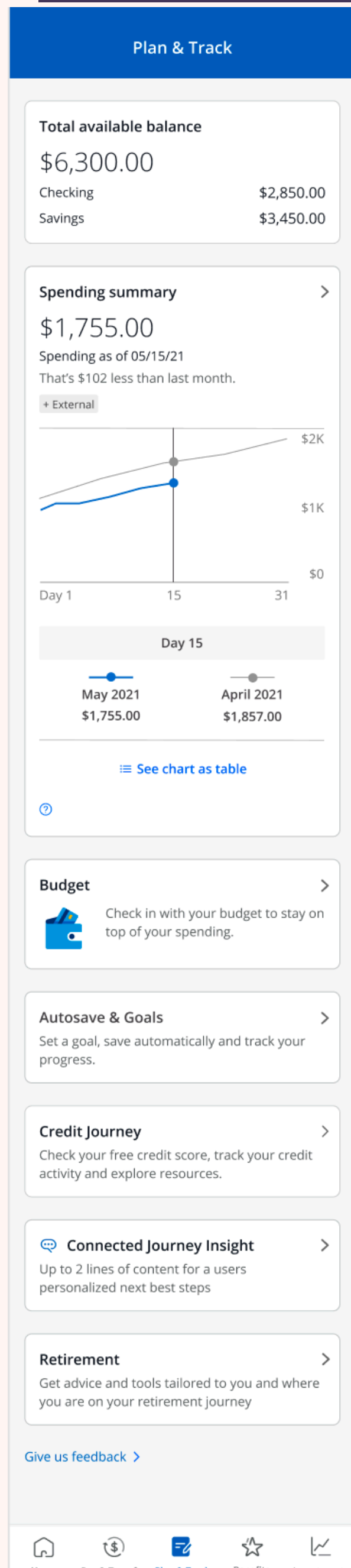

Dashboard 1.0

PLAN & TRACK

Camillia N. Shanks

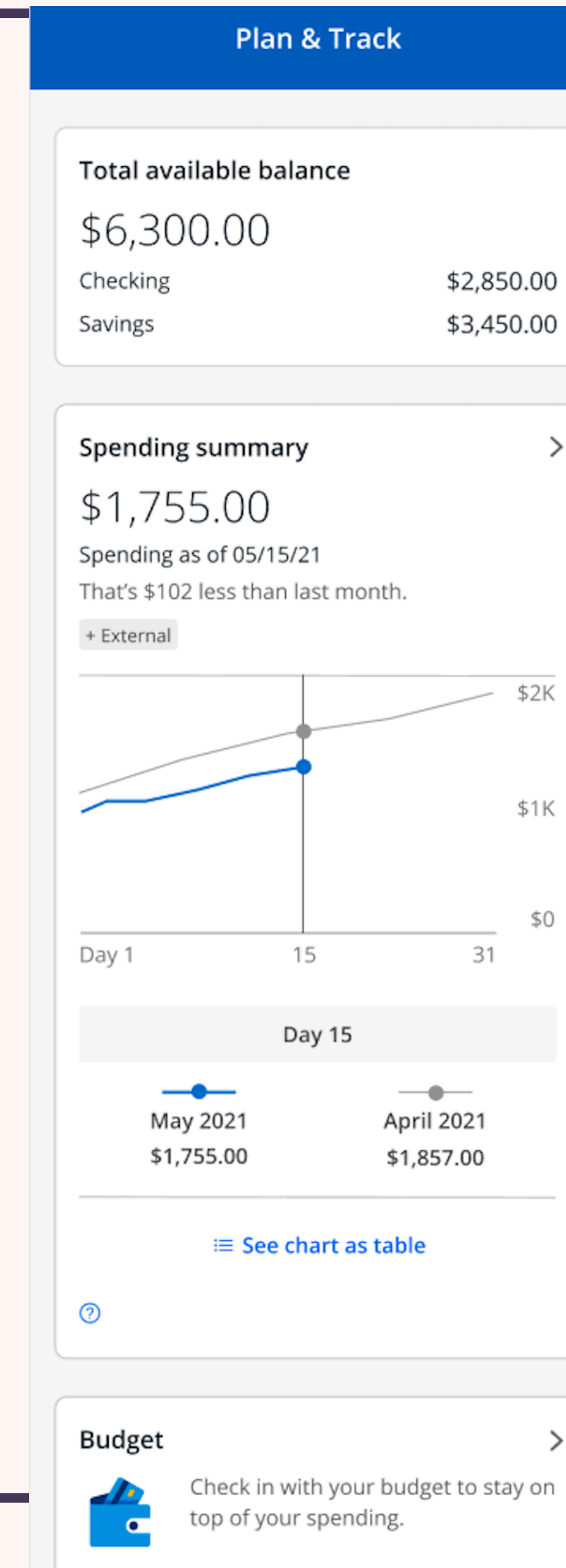


WHAT IS THE GOAL OF P&T?

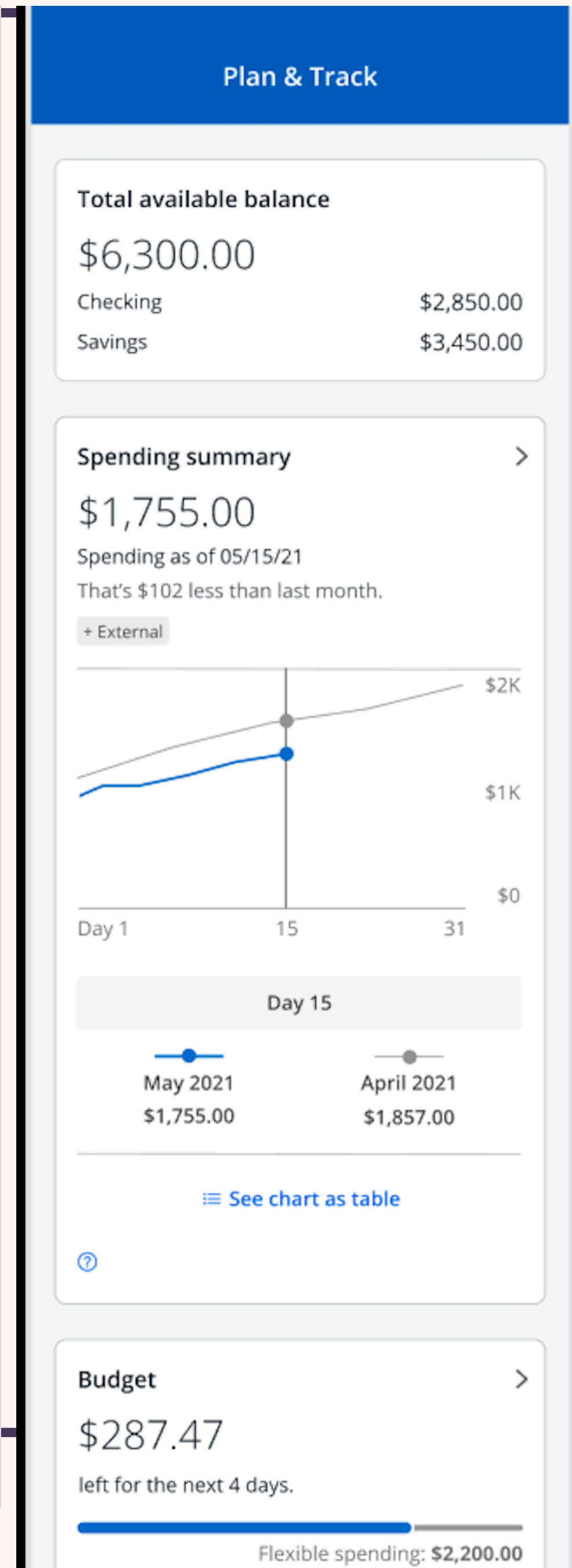
- **Give customers a general overview of their finances — all in one place**
- **Aggregation allows customers to add external accounts for a more accurate picture**
- **Prioritize day-to-day money movement**
- **Provide customers with the necessary tools to make the most out of their income as well as achieve other financial goals they may have**
- **Business goal: For customers to graduate from retail version to wealth version of dashboard with the end goal of engaging with a financial advisor**

JOBS TO BE DONE

- **Spending summary:**
 - **How much did I spend? How does it compare to the previous month?**
- **Budget:**
 - **How much do I have to spend for the rest of the month?**
 - **Is my spending on track?**



Unenrolled



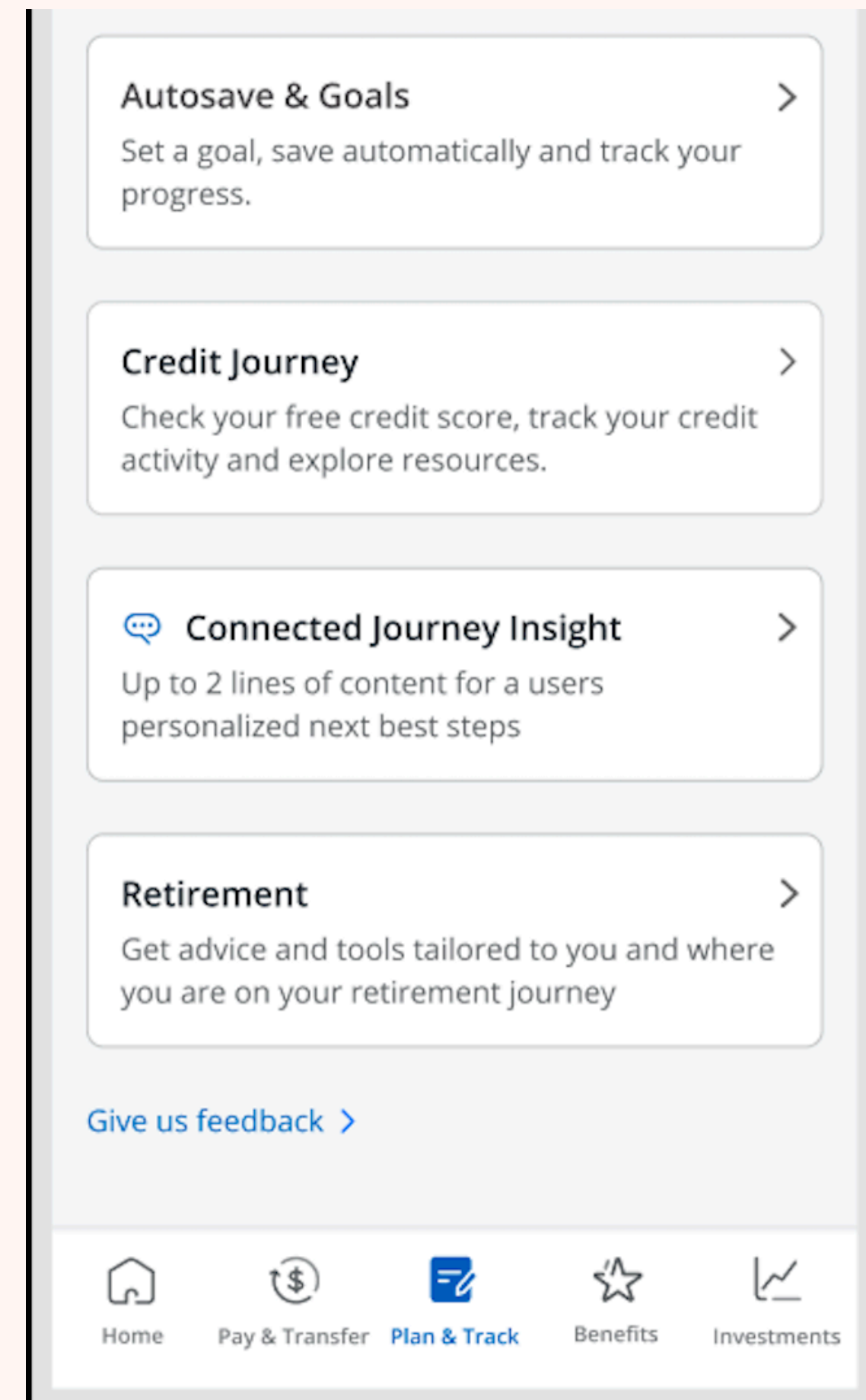
JOBS TO BE DONE

➤ Short-term goals:

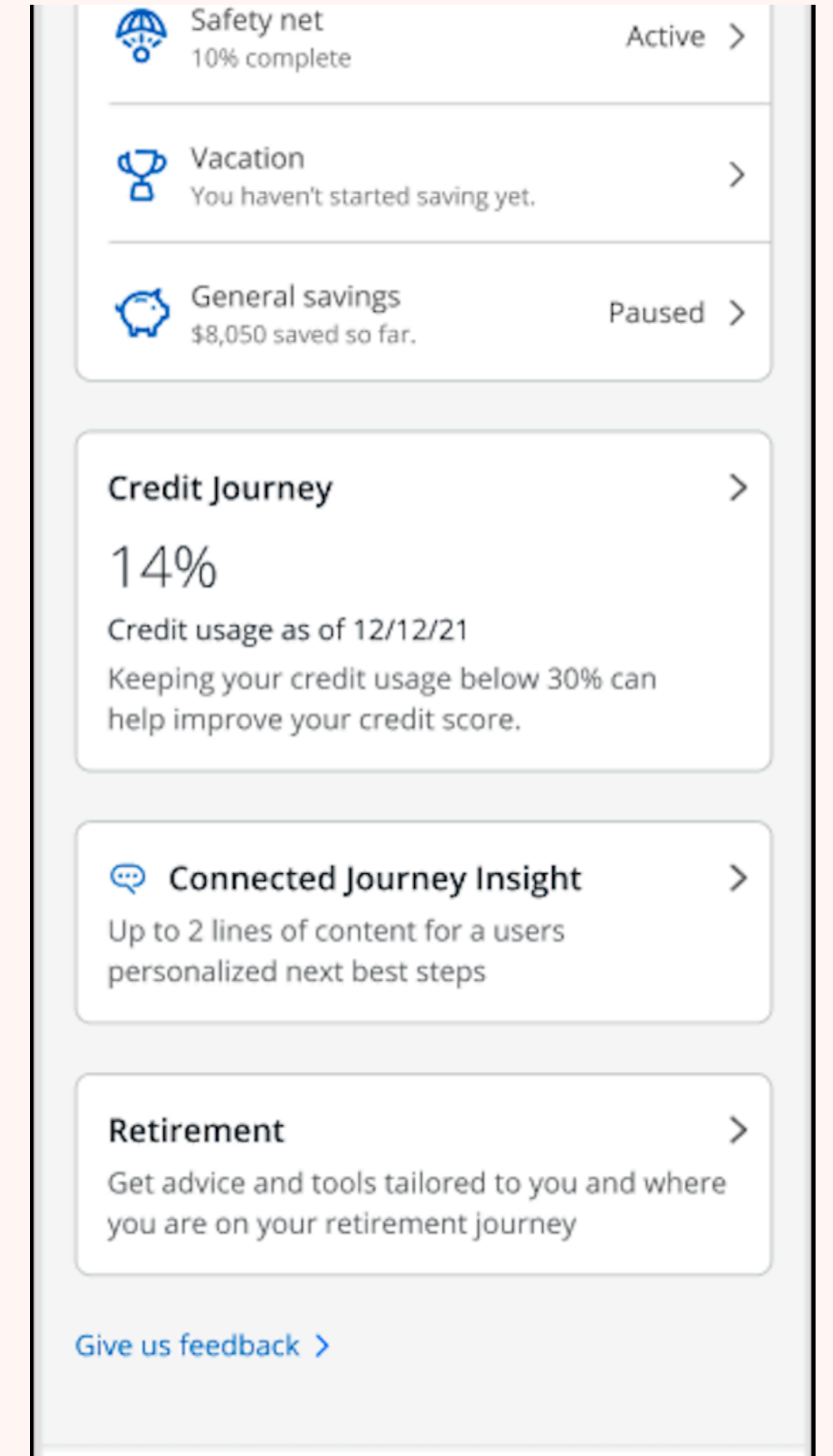
- Am I on track to fund my goals?
- How much more money is needed to reach my goals?
- What goals have Autosave enabled and are they active or paused?

➤ Credit Journey

- Is my credit in good standing? What's my credit score? What's changed over the last 30 days?



Unenrolled



Enrolled

CHALLENGES

- **Dashboard uncovered fundamental issues within individual tools**
 - **Budget: user testing confirmed that terminology like “flexible spending” was difficult to understand**
 - **Spending summary: not actionable and not accessible. Participants in user testing liked seeing their spending but felt like they were left hanging in terms of what to do next to do better with their spending**
 - **Credit Journey: Customers want to see their credit score and not so much their credit usage. Data shown not strong enough for users to explore more**
-

CHALLENGES

- **Unenrolled content didn't do a good job of letting the customer know what to expect when they clicked into the tool, why they should use and how (i.e. short-term goals).**
 - **UT participants didn't feel content prompted action or did a good enough job of differentiating from competitor tools**
 - **Collaborating with different product teams**
 - **Give and take over what is most valuable data to show to customers on dashboard and what product was willing to allow us to show (i.e. — Credit Journey)**
 - **Lack of interconnectivity**
 - **Overlap between budget and spending summary but services prevented them from being integrated**
-

STEPS TAKEN TO IMPROVE DASHBOARD 2.0

- **Collaborated with product teams to ensure consistency in language and provide specific content that provides value prop of the tool as opposed to generic language**
 - **Worked with design to scale budget data visualization back until Budget tool is revisited. This eliminated confusion around “flexible spending” at the skim level**
 - **This also helped “hide” the lack of connectivity between Spending summary & budget**
 - **Worked with design and accessibility partners to eliminate confusion around spending summary data viz**
 - **Still isn’t perfect but with additional HAT content to guide users to “See chart as table” we were able to achieve compliance**
 - **Developed content strategy that both informs the customer on the function of each tool and prompts action while adhering to voice and tone guidelines**
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