# O invst.io

# Overall

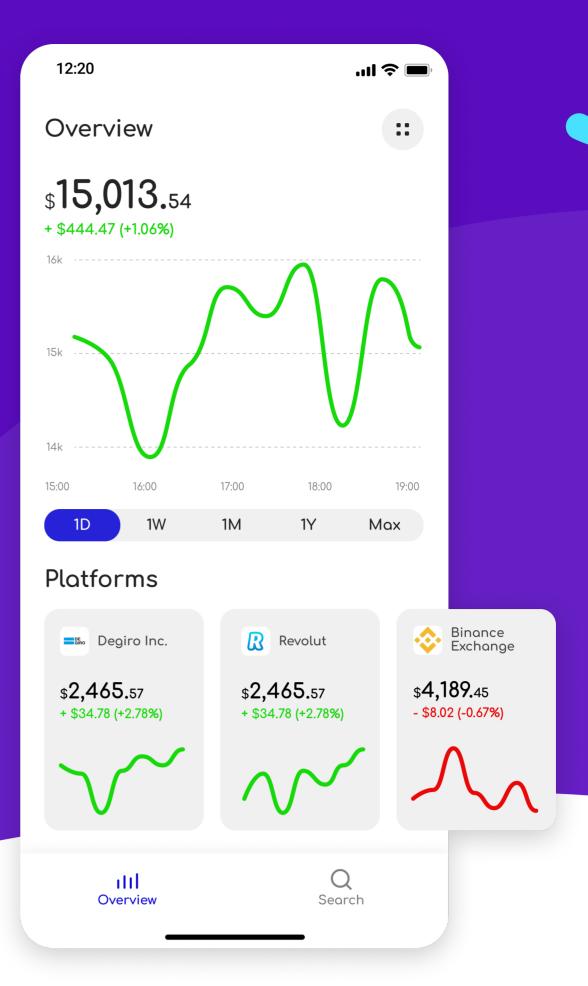
invst.io is a marketplace gathering investment platforms altogether. This allows users to easily manage and control all invested capital and assets from one place.

# Challenge

How might we upgrade private investors awareness of their investment proceeding?

# My role

My role was to proceed market and idea validation. I had to research the size of the following problem, find early adopters, conduct research and carry out the design end-to-end.





At the very beginning, the process had to follow up UX Design Process, however, due to the interviewees' shortage, I had to consider Lean UX to avoid spending too much time on respondents searching.



Discover

Secondary research Competitive analysis Online survey Remote IDI

Define Persona Journeys Stories

2

# 3 Ideate

User flow IA

Prototype Wireframes Internal testing UI Design

Evaluate User testing

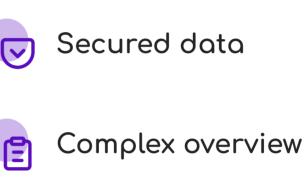
Expert evaluation

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# Discover Key insights

I conducted remote interviews with early adopters found among online survey respondents to gain some insights on their pain point, idea or any confusion about their previous experience with investment platforms. Here are some insights that I found out:

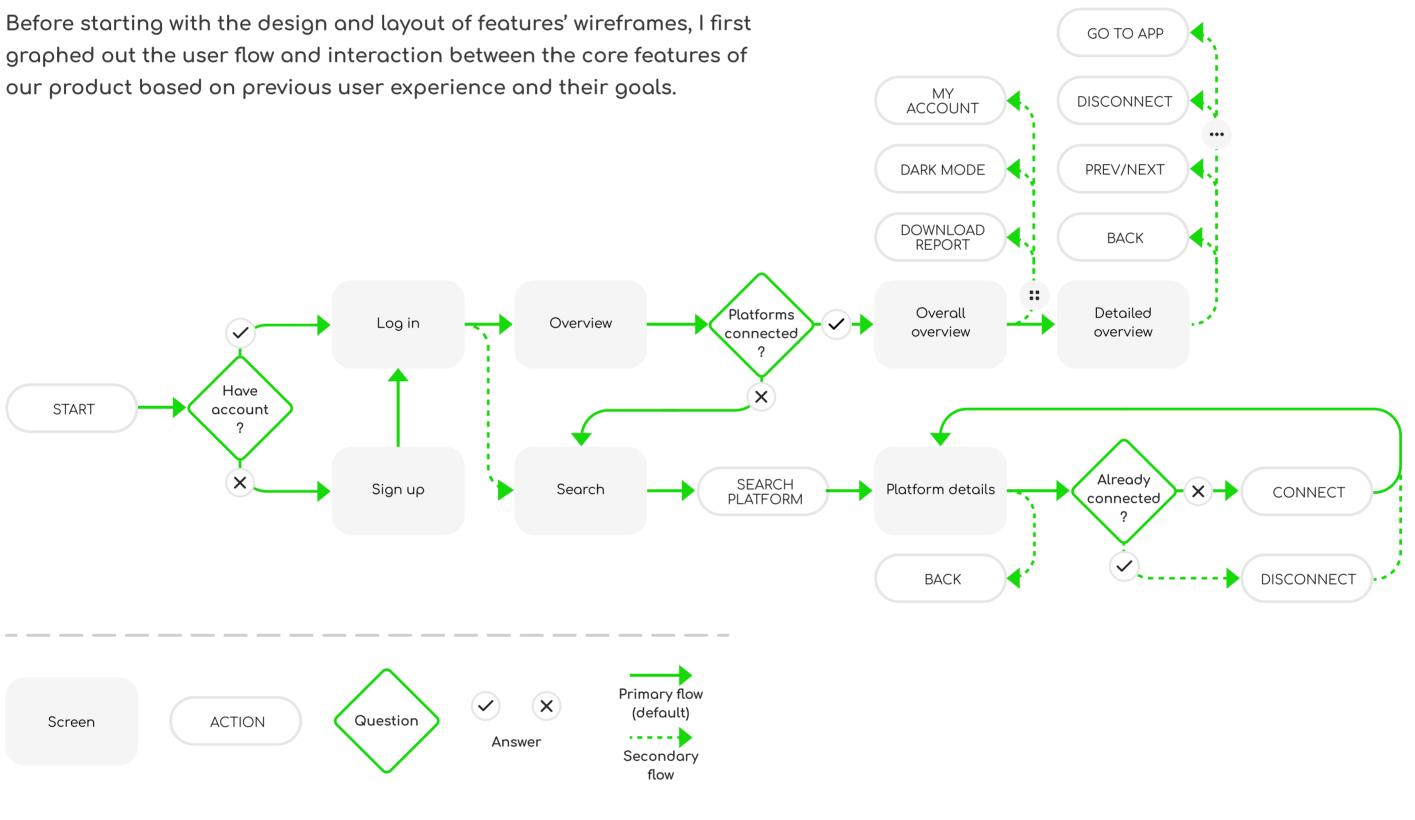
- 1 They feel safe with sharing access data among banking apps regarding PSD2, but don't feel the same to investment platforms.
- 2 They need to keep spreadsheets to have an overview of their platforms.
- 3 They feel uncomfortable that not all their platforms have a native app, even though their smartphones are already overloaded with apps.



Clean smartphone

# Ideate User flow

Before starting with the design and layout of features' wireframes, I first graphed out the user flow and interaction between the core features of our product based on previous user experience and their goals.



# **Evaluate** Usability testing

After the exploration process, I did usability testing. The idea is to have some feedback and getting closer with people that might use it someday.

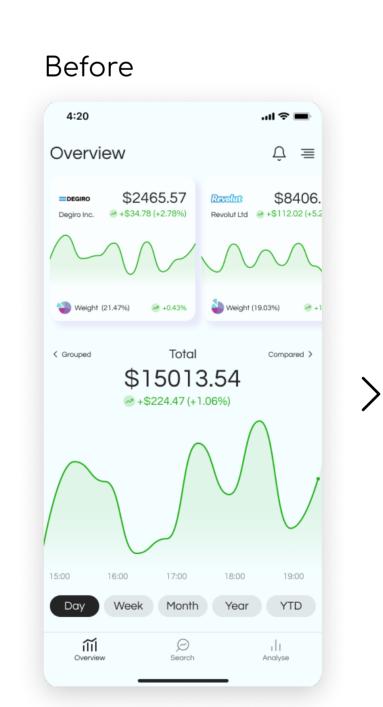
"Let's consider this is the only app to check your investments, tell me about portfolio performance and try to connect a new platform".

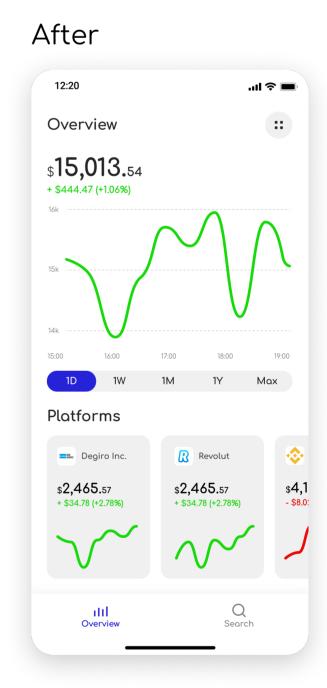
And then while testing, I tried to observe what are the reaction, feedback or behaviour. I found out that:

Most of the users were overloaded and confused with too many features. They demanded just the simplest ones they know.

Some of them expected more percentage and value context preview 2 and charts had to be equipped with specified date points.

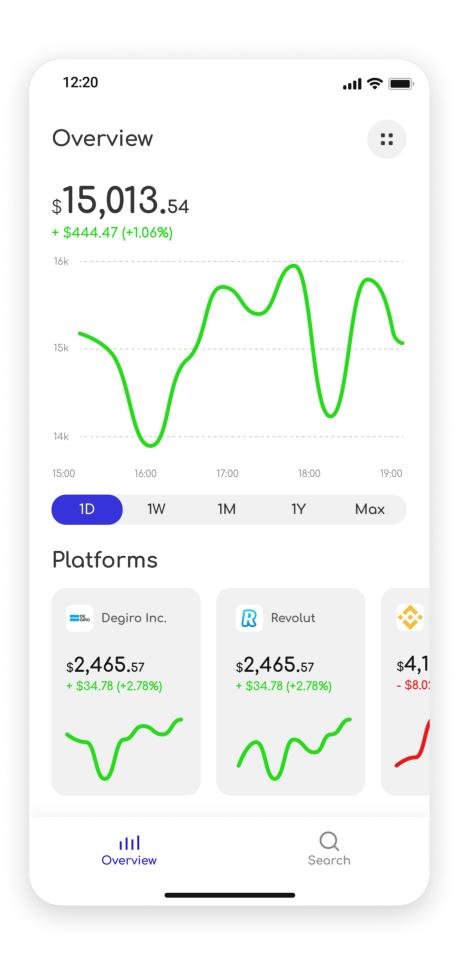
3 Copy needed some change due to people expectations 'Synchronize' turned into 'Connect' and 'Most trending' were confusing with trading at search screen.





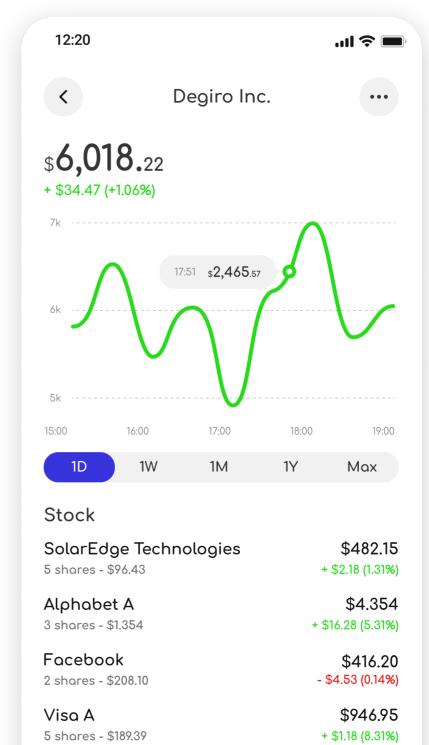
#### Design Deliverables

The whole User Interface presentation was designed by Marta (linked in description) and based on previously tested hi-fi wireframes. Initially, she designed the principal features in light mode version to convert them into black mode then and additionally she created a website for the whole platform.



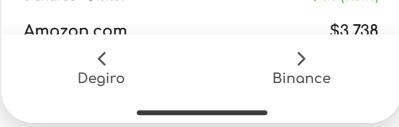
#### Overview

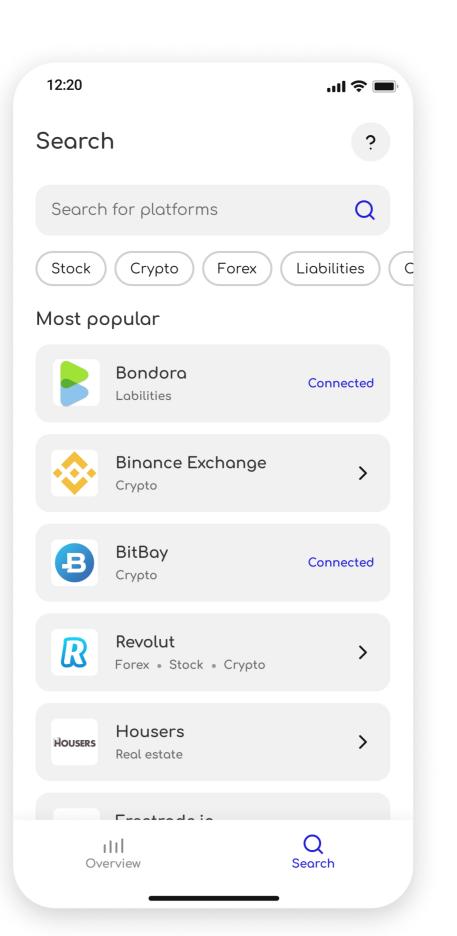
The overview displays overall and single platform value on the cards below and also shows their daily performance. This screen additionally allows to download a report, set a dark mode or simply get into "My account".



#### Detailed overview

User can get here by a tap on the platform card. It shows a detailed chart and all assets contained on the platform.



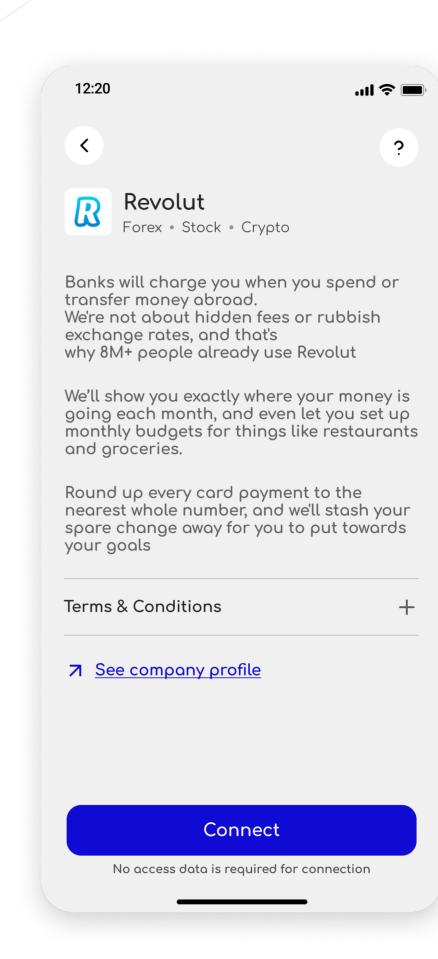


#### Search

The search screen main function is to easily find a platform to connect, besides, it helps to find a new one to diversify a portfolio.

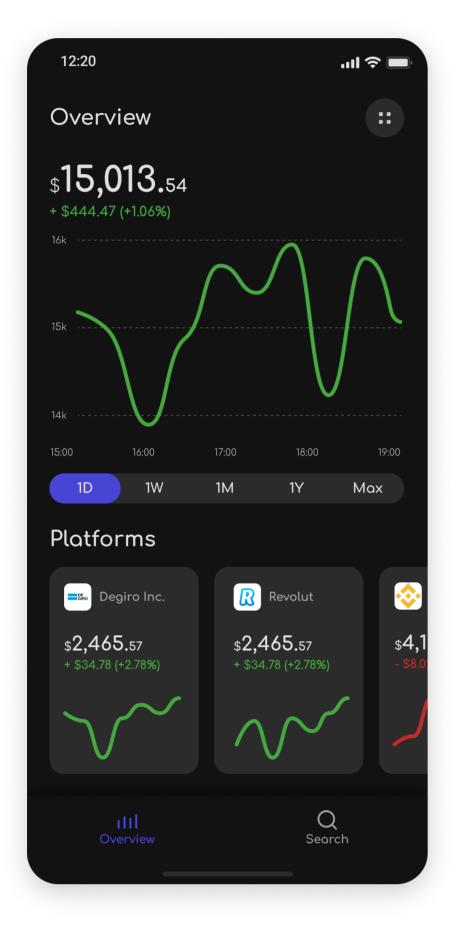
#### Detailed platform

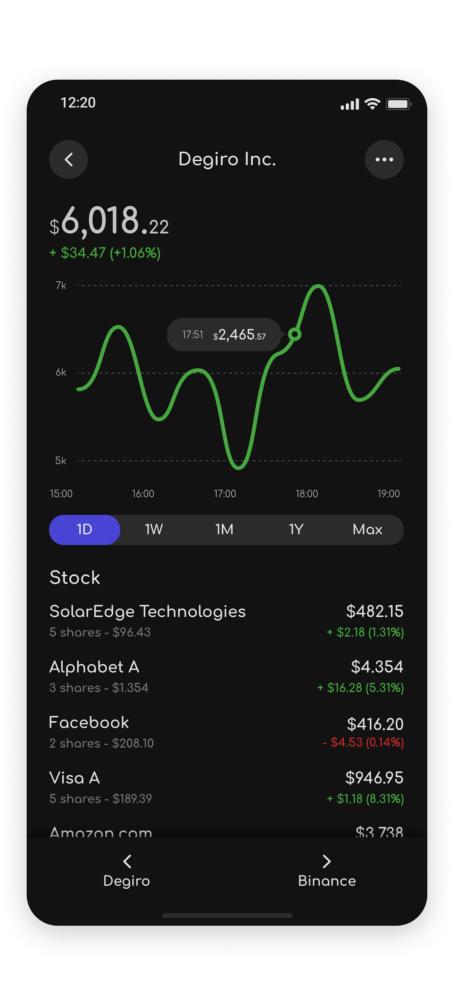
This screen acts as a platforms business card. You'll find briefly described each platform here. However, the main task of this screen is to connect platforms with invst.io.

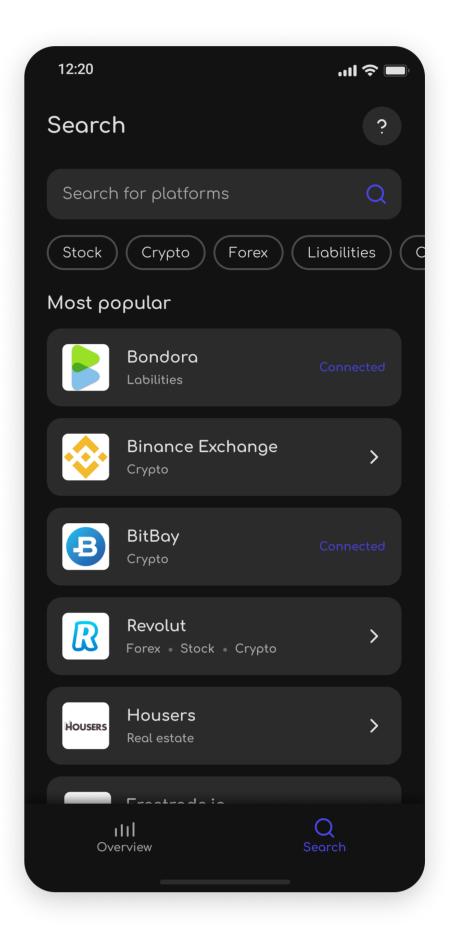


#### Dark mode

We also provided the dark mode to enhance visual ergonomics by reducing eye strain, facilitating screens to adjust according to current light conditions and providing the comfort of use in dark environments.

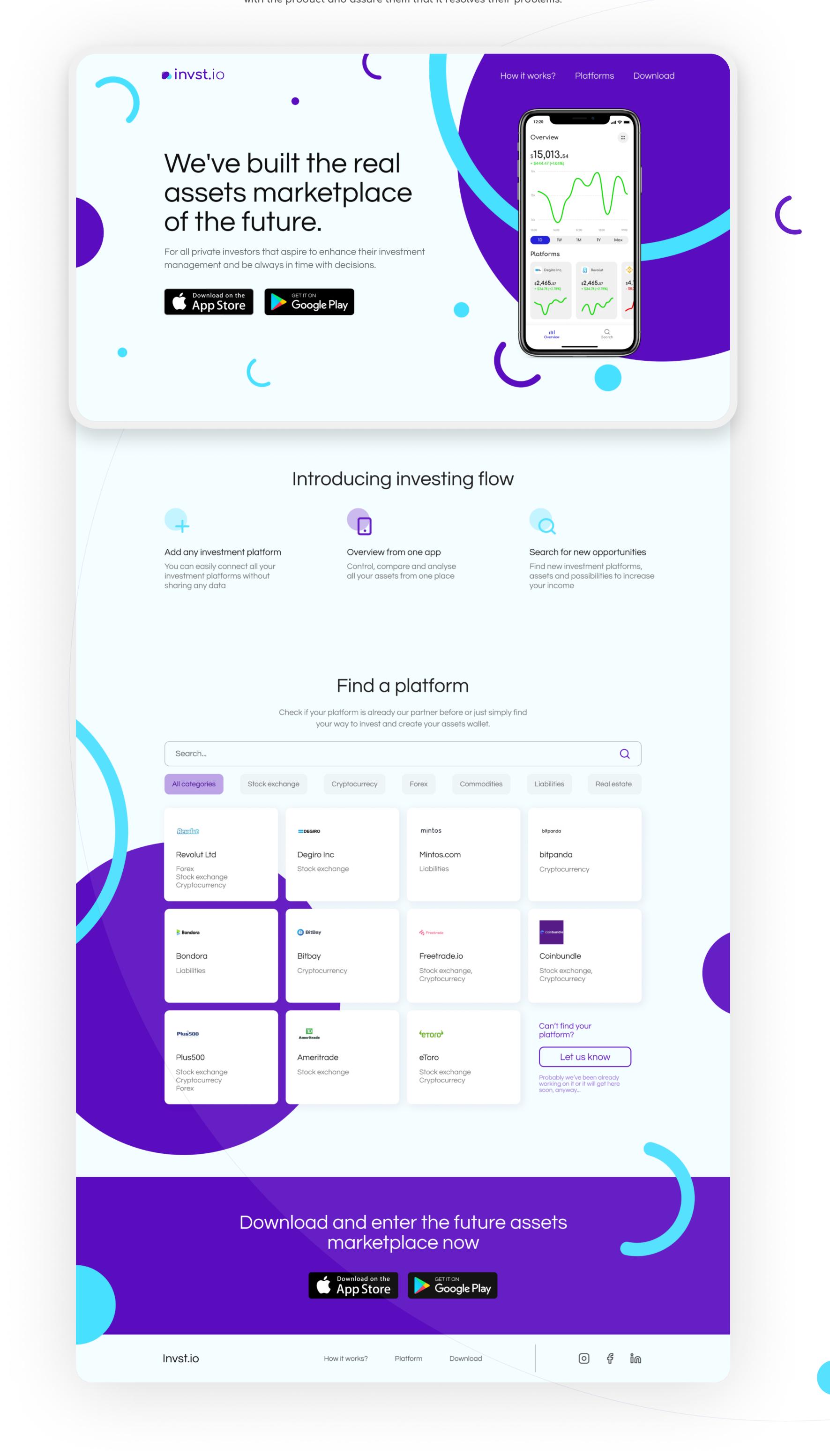






#### Website

We aspired to highlight the essential value proposition as interactive components to introduce users with the product and assure them that it resolves their problems.



#### Reflection Learnings

I've learnt tons of things during this project. Just a few most notable pointed out:

- Don't focus just on the design process, be aware of the whole product, Lean Startup and Disciplined Entrepreneurship approaches helped me a lot to understand it.
- 2 Data-driven design is a fundament of proper product creation, even short interview, talk or a survey is better than nothing.
- 3 UX Strategy and Product Design are the key fields I want to grow, I think I can produce nice looking UI, but it's more like a hobby.