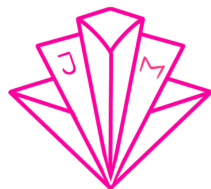




Case study:

BudgetPilot 

Jhany Miserque



Project overview

The product: App to control a travel budget.

Schedule a vacation period, log expenses, and set alerts to regulate and maintain personal finances.

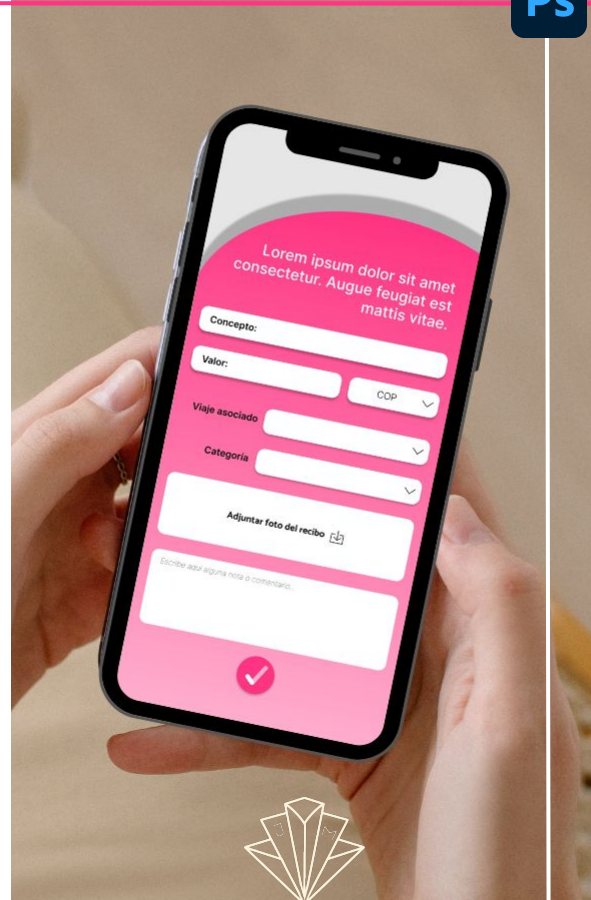
Project duration: 6 days.

The goal: BudgetPilot app will allow users to control their travel budget.

Providing a solution for **travelers** who want to plan their vacations, track their expenses, and maintain their personal finances. Effectiveness will be measured by **analyzing budget metrics** and **traveler satisfaction**.

Note: This mockup was done in Adobe Photoshop to make a visual of what the product would look like, using free templates.

Ps



Case study:

BudgetPilot



Understanding the user

- ❖ Research of references
- ❖ User research
- ❖ Personas
- ❖ Goal statement
- ❖ User journey maps



Research of references

Foundational definition: **BudgetPilot** transforms every trip into a **worry-free experience**, allowing travelers to focus solely on what's essential: enjoying and living in the moment. More than just an app, it will be the **indispensable tool for every modern traveler**, with a **minimalist, agile, and visually serene** offering, capable of managing expenses with intelligence, security, and absolute confidence.

Through a **competitive audit**, I took the user's position and research the current market, analyzing three criteria:

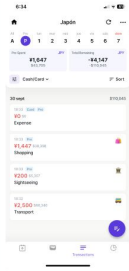
- Expense control dashboard: *Easy to access and understand.*
- Process to create a budgeted trip: *Linear and intuitive.*
- Expense tracking: *Easy to access, fast, and user-friendly.*

The apps were selected for having the highest number and quality of reviews on the App Store and Play Store, within the personal finance category focused exclusively on travel.

Note: This research was done in Figma, to keep all the information together and easy to access.



Research of references

	Expense control dashboard <i>Easy to access and understand.</i>	Process for creating a budgeted trip <i>Linear and intuitive.</i>	Expense tracking <i>Easy to access, fast, and user-friendly.</i>	UI Main Page
 TravelSpend by Ori App Studio	 It's not easy to understand, and there wasn't a tour explaining each metric. Many attention grabbers offering to add features.	 As soon as you open the app, it guides you through creating a trip, asking for dates, desired currency and maximum budget.	 Easy to access but not very user-friendly, it feels like a list and it is not fast because you have to decipher what goes in each box.	
 Trabee Pocket by Jhcho	 It can only be accessed with the Pro version. The only data it shows is a list of expenses.	 As soon as you open the app, it guides you through creating a trip, requesting dates.	 Easy to access and friendly but not very useful, it's like just keeping a list of expenses.	

Research of references

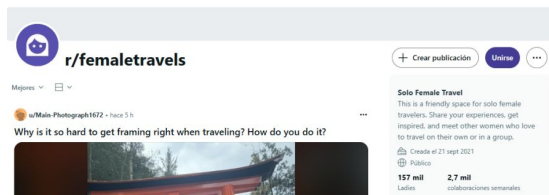
Through **secondary research**, I gathered information from specialized UX websites and social media, identifying the main features and market trends for this type of application. I identified design patterns, best practices, and user expectations:



Note: The designs featured were compiled from their respective websites. All copyrights and intellectual property rights belong to their original creators.

User research

Through **secondary qualitative research** on internet forums, opinion articles, scientific publications, and websites, I defined the potential **BudgetPilot** traveler user, developing a brainstorm of relevant ideas.



ECONOMÍA DEL TURISMO.
UN PANORAMA*

GINÉS DE RUS
CARMELO LEÓN
Universidad de Las Palmas de Gran Canaria



Introducción a la historia
del turismo

José M. Faraldo
Carolina Rodríguez-López



Conclusion of the investigation: Travelers

Users seek to fully enjoy their trips, with the peace of mind that their finances are organized.

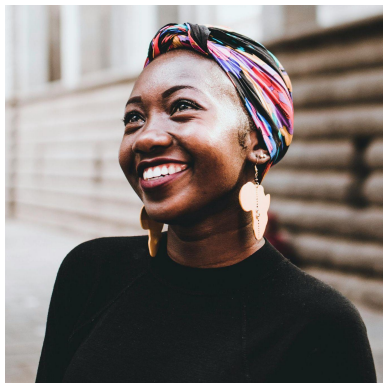
There are common frustrations with today's apps: unclear processes, lack of empathy, and excessive technical jargon.

People value simplicity, speed, and confidence in managing their budget.

Traveling also involves a search for personal growth, authenticity and freedom.



Personas



Using the definition of a traveler, I created two **personas** (*fictional users*) that represent the needs of a larger group: Bety and Ax. I wanted to be able to constantly evaluate my design decisions with each persona's goals and frustrations (pain points).

Note: These images are copyright free, used to give realism to the Personas.



Bety

Age: 36

Education: Master's Degree in Virtual Education

Location: Salvador, Brasil

Family situation: Single with a kitten

Occupation: Virtual teacher

“Viajar é conhecer e conhecer é viver”

“To travel is to know and to know is to live”

Goals

- ❖ Travel to different countries while continuing to save for her pension and future.
- ❖ Fully enjoy her trips, with the peace of mind that her finances are organized.

Frustrations

- ❖ Wasting time manually adjusting her accounts instead of enjoying the journey.
- ❖ Not having immediate clarity on how much she can spend without compromising her savings for the future.

Bety defines herself as a “*educadora sonhadora*” who, thanks to her virtual profession, promotes education while nourishing her soul with diverse landscapes and cultures. Her mother always told her to keep her head in the clouds but her feet on the ground, and that's why, for her, a good trip combines dreams and well-planned finances.



Ax

Age: ND (no disclosure)

Education: Bachelor of Nursing

Location: Buenos Aires, Argentina

Family situation: They live with their partner

Occupation: Nurse

Si querés llorar, ¡llorá!

"If you want to cry, cry!"

Goals

- ❖ Travel with their partner to experience deep emotional experiences.
- ❖ Manage their finances simply and reliably, so they can focus on enjoying the moment.

Frustrations

- ❖ The uncertainty of not knowing whether they will be able to maintain a balance between saving and fully enjoying each trip.
- ❖ Finding finance apps that are unsympathetic or too technical.

For Ax, traveling is a way to feel intensely and connect with new realities; however, the idea of planning budgets and managing expenses causes them stress and fear of getting entangled. Their partner describes them as the "empathy personified," because although their job can be demanding and painful, they find great satisfaction in helping others.

Goal statement

To deepen my understanding of users, I created a **Journey Map** for Bety and Ax, about a **user task** for one of the app's core functions.

User Task: Use the **BudgetPilot** app to set the budget limit for a trip.

I developed a two-level **storyboard** (big picture and close-up) that illustrates the scenario of this task, allowing both, the overall experience and the key details of the user journey, to be visualized.



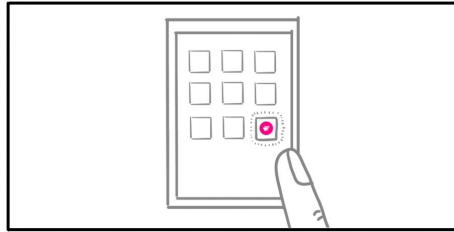
Journey Map

Actions 		Download the BudgetPilot app	Find where to create a new trip	Follow the process and set the desired budget
Task List		1.Turn on the phone 2.Go to the app store 3.Find the BudgetPilot app 4.Download the app	1.Open the app 2.Find the button to add a new trip on the Main Page	1.Fill out the requested information, including the budget 2.Save the created trip
Feeling Adjective	Bety	Familiarity because it is a process that has been done on multiple occasions.	Satisfied that the button is visible and on the main screen. Although she didn't like having to watch the tutorial.	Joy because she understands the process; it's linear and fast. She feels her journey is more tangible.
	Ax	Confusion because they're not sure if it's the right app or not.	Relief because the app included a tutorial that showed them where they were.	Satisfaction because they were able to create a budget in a simple and straightforward process
Improvement Opportunities: Bety and Ax		-Use the same logo on the website and in the app, and maintain brand identity to provide security.	-Include an optional tutorial for those who need it, without interrupting the experience for those who prefer to explore on their own.	-Increase the sense of reward with pop-ups or future gamification. -Display user progress visually to provide clearer and more motivating guidance.

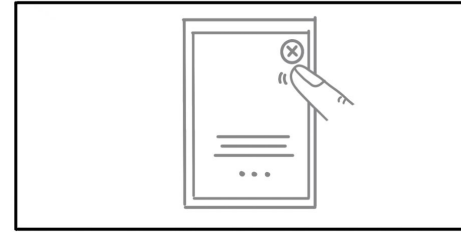
Close up storyboard

◆ **User task:** Use the **BudgetPilot** app to set the budget limit for a trip.

◆ **Scenario:** An app that allows travelers to budget for their trip in a simple and intuitive way.



Traveler finds the app BudgetPilot and opens it.



Traveler skips navigation tutorial and search where to create a new travel



Touch the "add new trip" button and follow the process

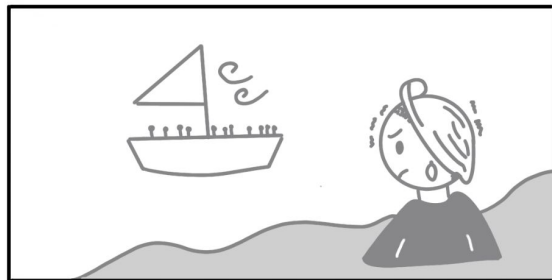


Set the desired budget and save the new trip

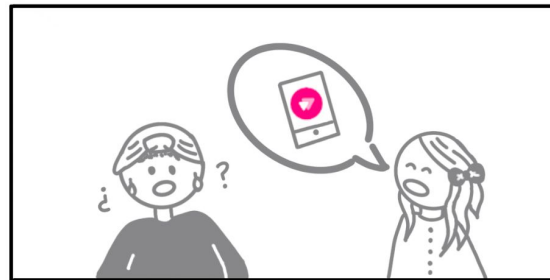
Note: I made this drawing in Procreate for a quick and easy sketch to export.



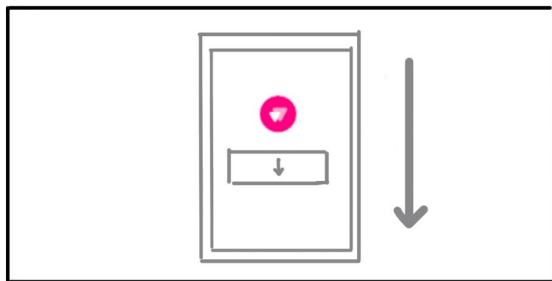
Big picture storyboard



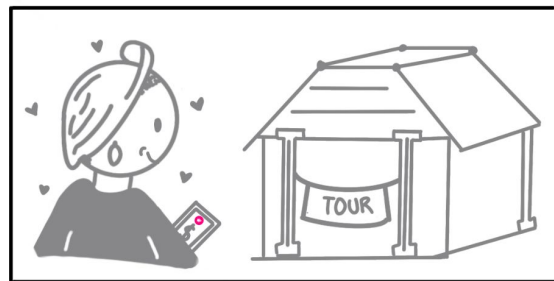
Bety is on vacation and couldn't go to a tour because she got confused making the budget



Her hostel mate tells her about "BudgetPilot"



Bety downloads the app and creates the budget for her next trip



Bety was able to go to all her plans and save for the future



Case study:

BudgetPilot



The design

- ❖ User flow
- ❖ Information architecture
- ❖ Low fidelity wireframes
- ❖ High fidelity wireframes
- ❖ Functional prototype
- ❖ Accessibility

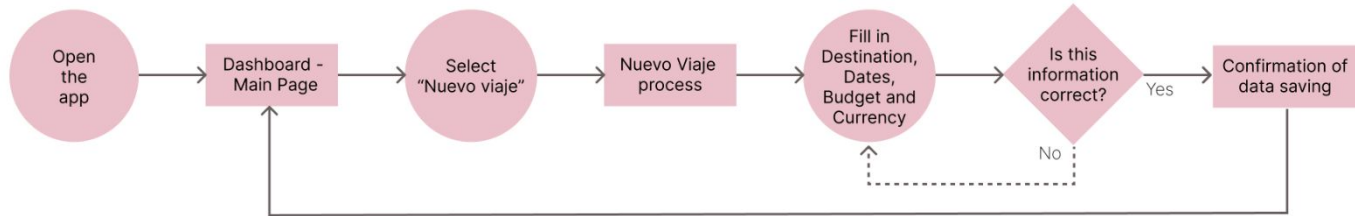


User flow

In the ideation phase, I start with the **user flow** to define the windows needed to accomplish the user task.

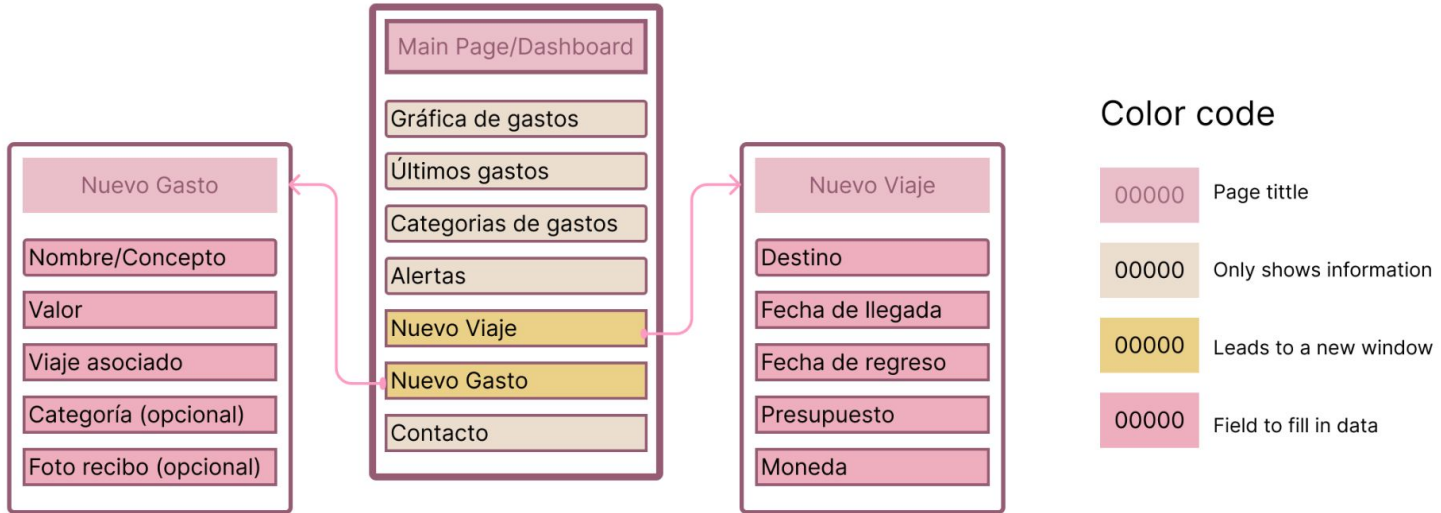
User Task: Use the BudgetPilot app to set the budget limit for a trip.

1. Open the app
2. View Dashboard-Main Page window
3. Select the "Nuevo viaje" button
4. View New Trip window
5. Fill in Destination, Arrival Date, Return Date, Budget, and Currency
6. Is this information correct? (Yes or no)
7. View data save confirmation window



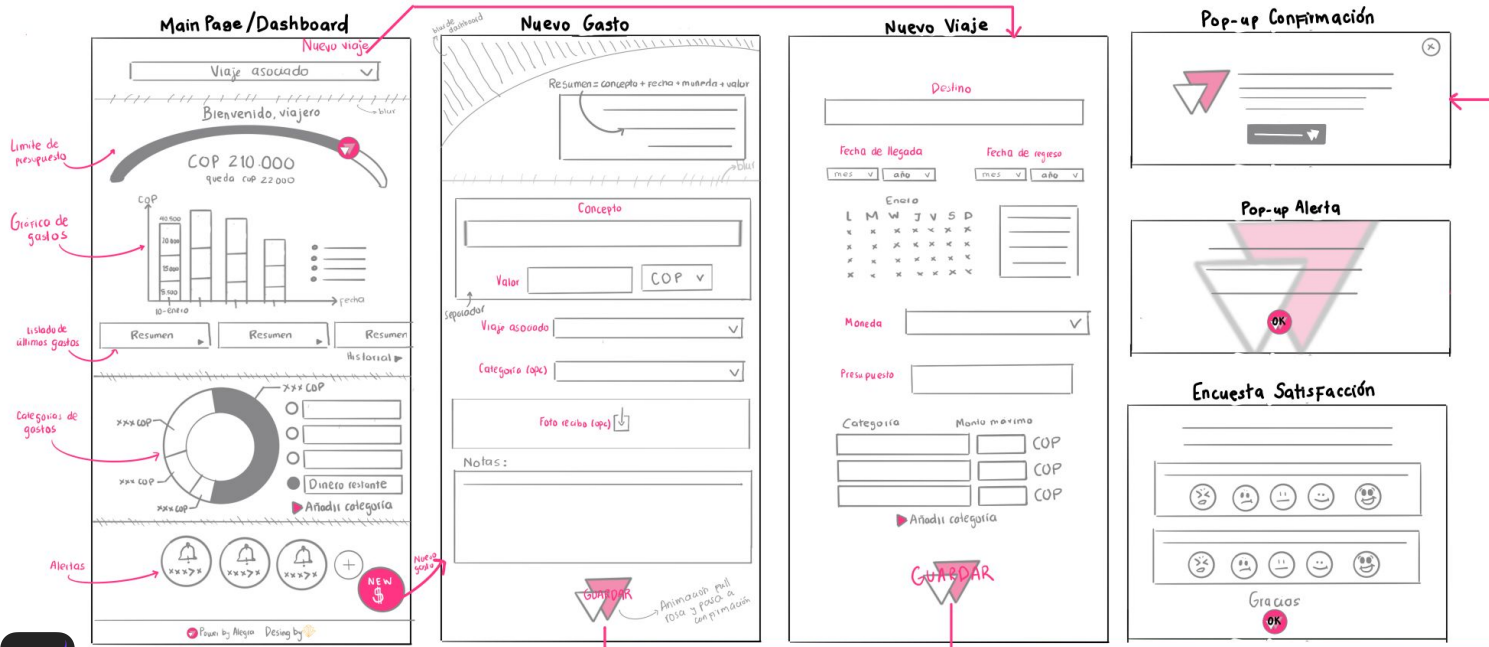
Design architecture

I then moved on to **design architecture** , which will allow me to have a guide to the possible paths in user interaction.



Low fidelity wireframes

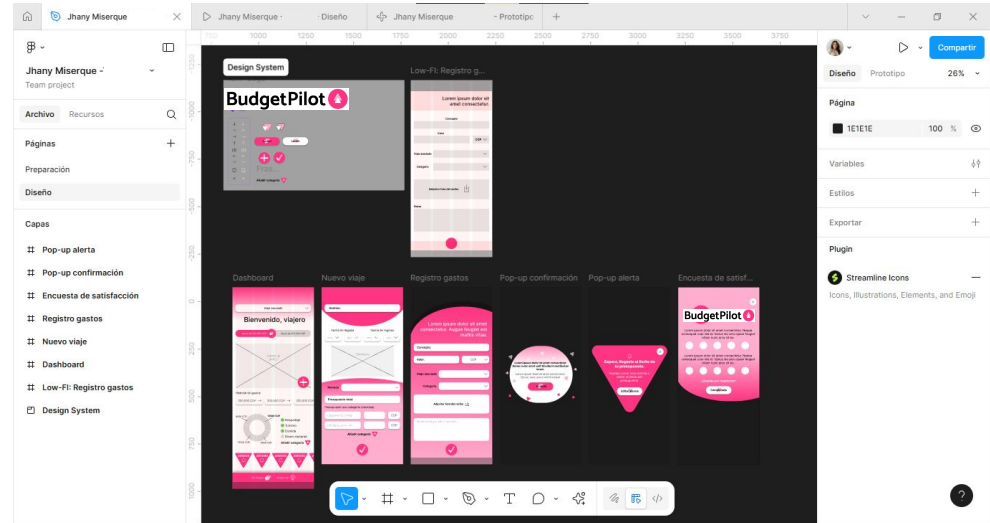
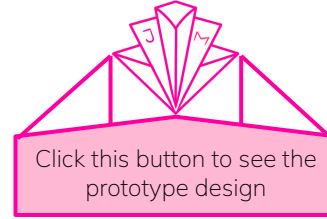
Using the previous diagrams as a guide, I created the **low-fidelity wireframes** taking into account what was requested.



High fidelity wireframes

I developed **high-fidelity wireframes** in **Figma** to complete the task of creating the interface for the three main screens that represent the app's core functionalities. I also designed **complementary screens** for confirmation pop-ups, alerts, and satisfaction surveys to complement this delivery.

During this process, I developed a small **design system of my own**, which allowed me to optimize the workflow, ensure visual consistency, and maintain **BudgetPilot**'s brand identity throughout the interface.



BudgetPilot App - Close up



Visual hierarchy with the font.

Law of Prägnanz: First look at the simple and memorable application.

Jakobs's Law: consistency and familiarity.

Law of common region: Close objects are similar.

Serial position effect: The user remembers their balance and their alarms (first and last)



Page position scanning patterns: Layer cake.

Keep the process simple. Do it straight.

Indication of what is expected in the field

Call to action: give the instructions and then press the Go! button.



F

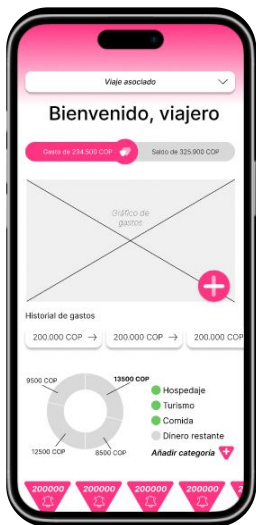


Click this button to see the functional prototype



Accessibility considerations

Dashboard designed for "next billion users"



Eye-catching alerts and legible text to grab attention.

Immediate feedback that ensures the action was recorded



Combinations with sufficient contrast between text and background to ensure readability

A form for adding a receipt. It includes fields for 'Concepto:', 'Valor:', 'COP', 'Viaje asociado', and 'Categoría'. Below these fields is a button labeled 'Adjuntar foto del recibo' with a camera icon. At the bottom, there is a text area with a placeholder 'Escribe aquí alguna nota o comentario...' and a red checkmark button.

Use of legible typography

Text fields with clear suggestions and placeholders.



Case study:

BudgetPilot

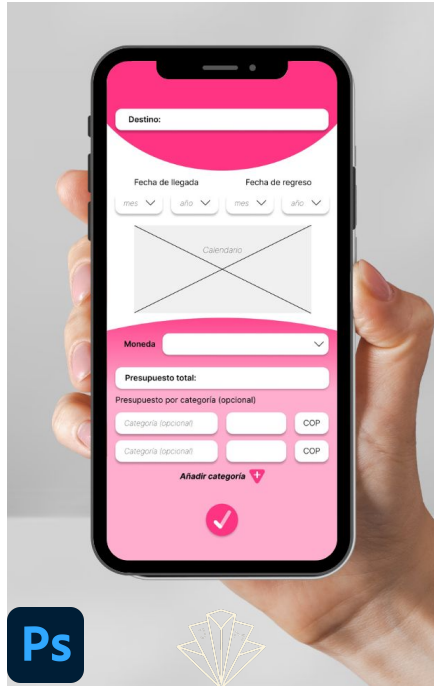


Going forward

- ❖ Takeaways
- ❖ Next steps



Takeaways



What I learned:

- ❏ In addition to reinforcing my knowledge of the softwares (Figma, Procreate, Adobe Photoshop, Google Slides and Docs); this challenge allowed me to optimize my **time management** and the organization of my personal schedule.
- ❏ I also strengthened my **strategic thinking** and prioritization skills, leading me to make clearer, more focused design decisions.

Next steps



Design is a continuous process, leading to constant iteration, so I propose **analyzing the data metrics** obtained from the satisfaction survey at the end of the user journey. This will allow us to identify usage patterns, detect friction points, and validate the most valuable features.

As a designer under the User Center Design philosophy, I make decisions based on data and user feedback, which is why I would implement new windows and functionalities in the next **sprint**, such as:

- Customization options that make the experience closer to the traveler.
- Group travel to manage shared and individual finances.
- Travel history with financial advice (if desired) based on the travel consumptions habits.
- Biometric or numeric security (if desired) for more privacy in their finances.





The end.



Thank you

