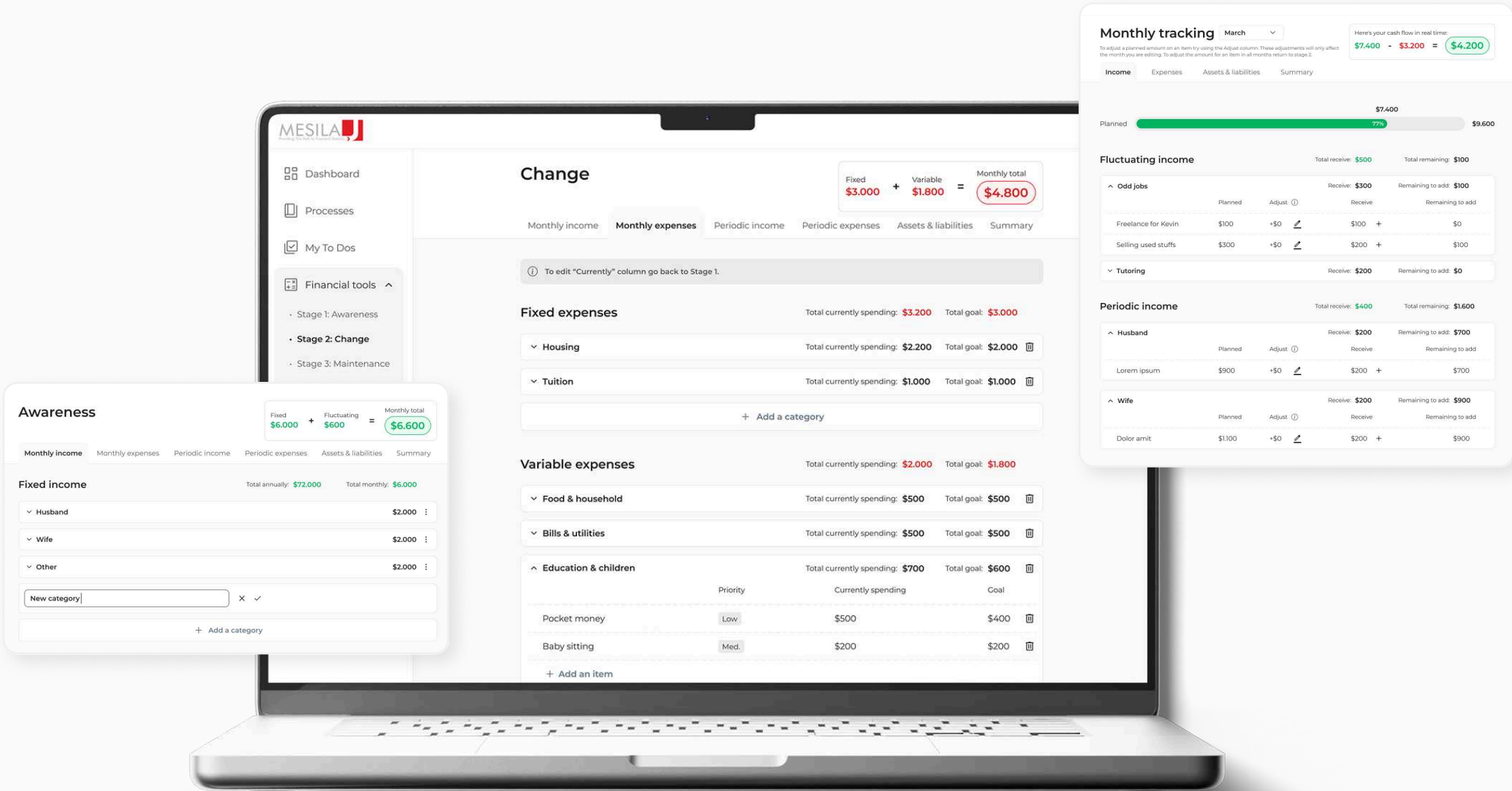


Overview

Domain: E-learning

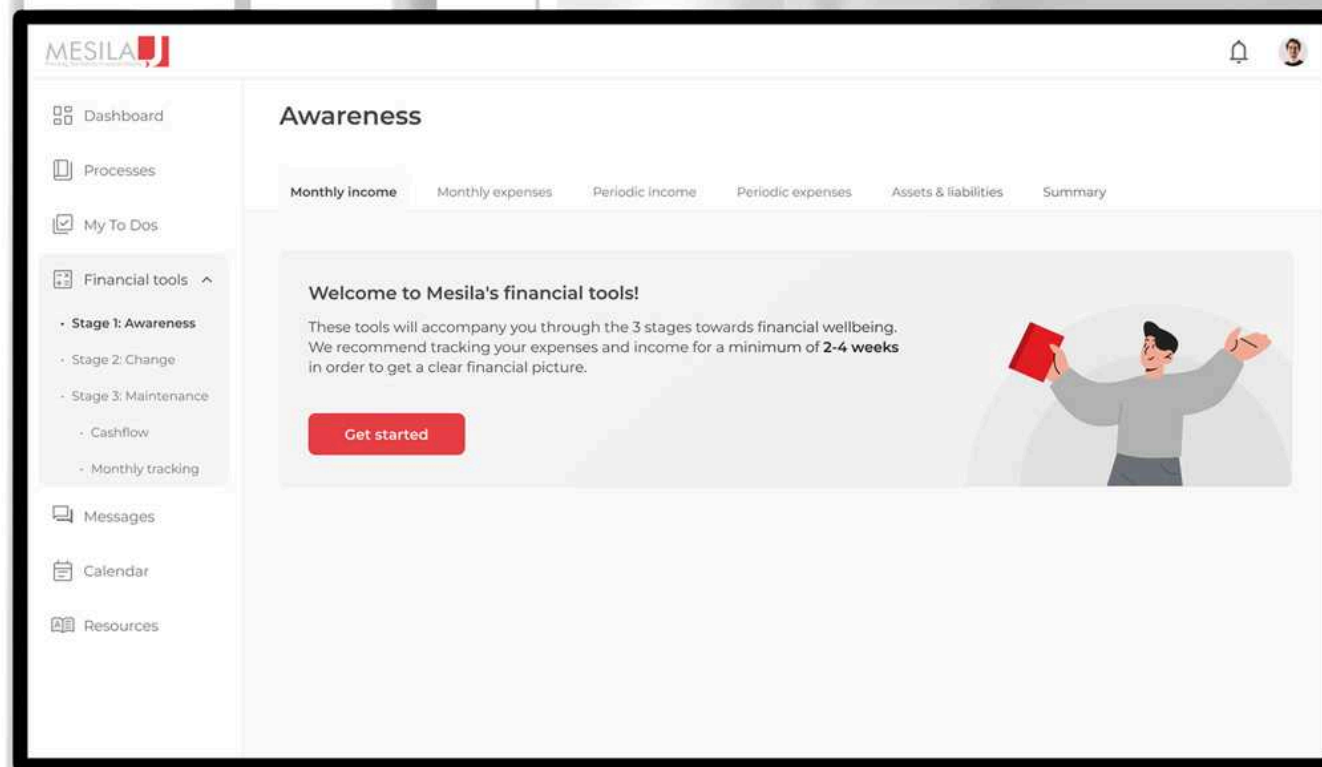
Time: 2023-2024

Role: UI/UX Designer



The Project

Mesila is undergoing a digital transformation to modernize financial education for families and businesses. The initiative includes a digital learning platform for online courses, and a comprehensive content strategy. The goal is to increase accessibility, engage a wider audience, and offer personalized support to empower informed financial decision-making and improve financial literacy.



Style

TYPOGRAPHY

Montserrat

Regular | Semibold

AaBbCc

0123456789

!@#\$%^&*

PRIMARY COLOR

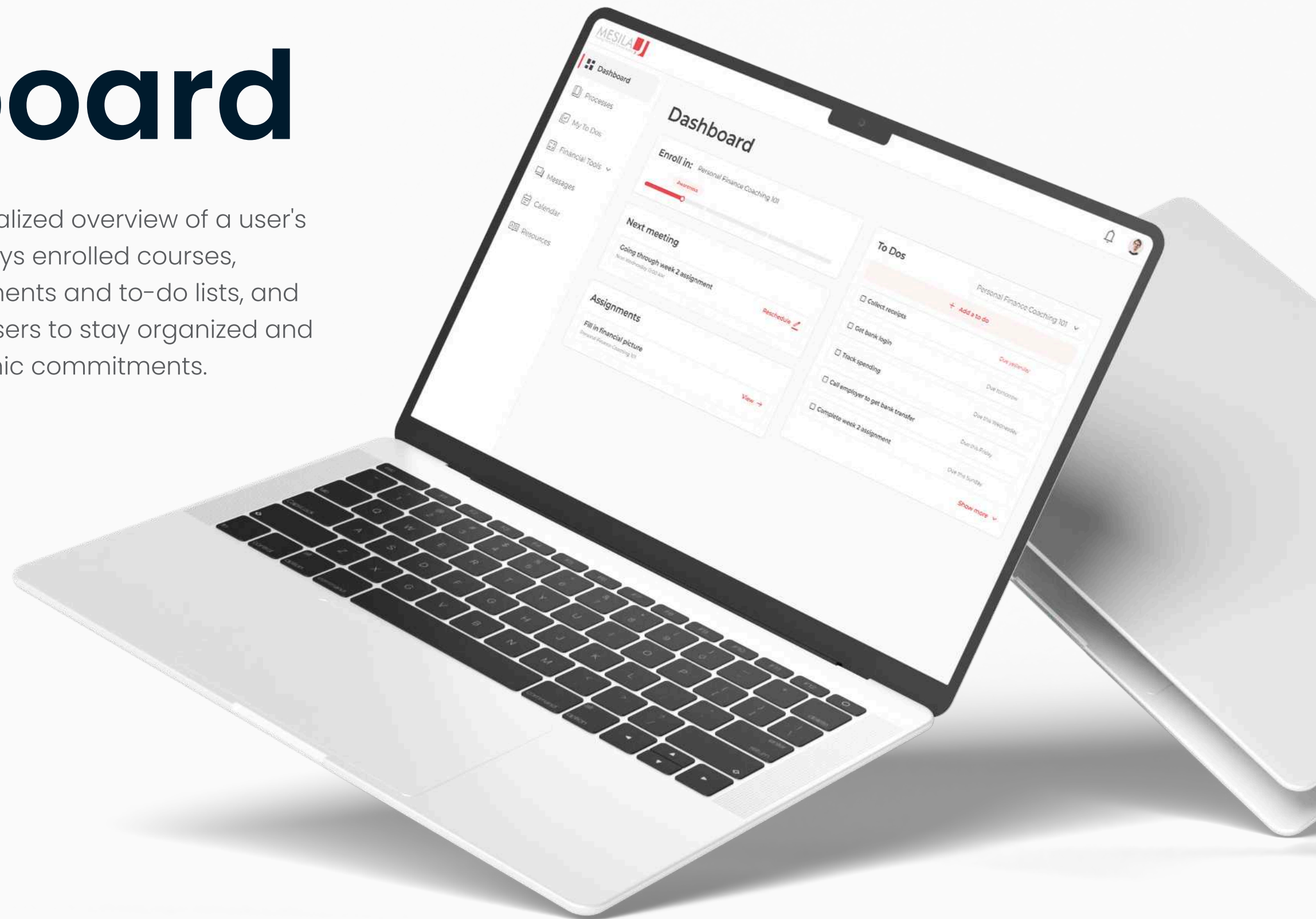


SEMANTIC COLOR



Dashboard

The Dashboard provides a centralized overview of a user's current learning journey. It displays enrolled courses, upcoming deadlines for assignments and to-do lists, and scheduled meetings, enabling users to stay organized and efficiently manage their academic commitments.



My Processes

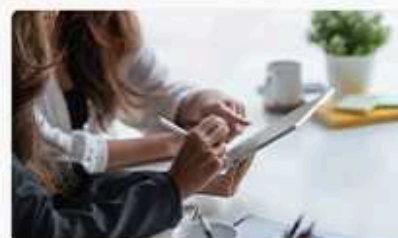
Processes < >



6-Session Coaching

17%

6 meetings with one of our trained coaches to help you identify your current financial situation, establish financial goals and build a plan to bring them to fruition.



Personal Financial Coaching

35%

This is a powerful process guided by an experienced coach that will bring you closer to financial freedom.



Financial awareness - 2 Meetings

30%

In the course of 2 meetings led by a professionally trained financial and personal coach you will have opportunity to gain a thorough picture of your financial situation...



Courses



Processes > Personal Financial Coaching

Personal Financial Coaching

Assignments

Fill in financial picture

Personal Finance Coaching 101

View →

To Dos

+ Add a to do

☐ Collect receipts

Due yesterday

☐ Get bank login

Due tomorrow

☐ Track spending

Due this Wednesday

☐ Call employer to get bank transfer

Due this Friday

☐ Complete week 2 assignment

Due this Sunday

Show more ▾

Process steps

▼ Awareness

✓ Completed

^ Change

^ Meeting 3

Getting to know you

Assignment - Fill in financial picture

Helpful articles

^ Meeting 4

Introduction

Assignment

▼ Maintenance

Next meeting

Going through week 2 assignment

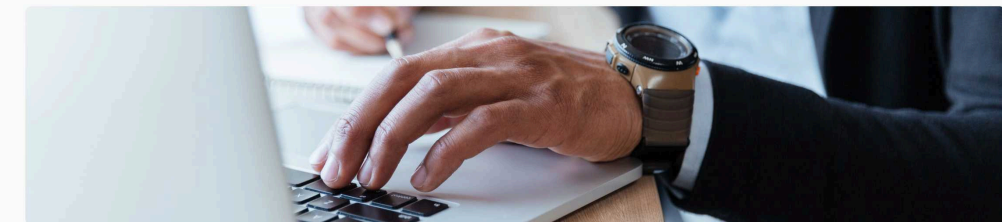
12/07/2023 12:00 AM

Reschedule ✎

Processes > Digital Learning Program

Digital Learning Program

35%



DESCRIPTION

Embed responsible and mutual value creation practices within organizations to accelerate systemic change by business becoming major contributors to solving the problem of people and planet.

MODULES

▼ Module 1: Responsible business

✓ Completed

^ Module 2: Corporate purpose

^ Lesson 1: Human assumptions

Overview

Objective

Conclusion

▼ Lesson 2: Establish your corporate purpose

▼ Lesson 3: Design your purpose metrics

▼ Module 3: Ecosystem orchestration

▼ Module 4: Interventions

PROCESSES

Coach-led

COURSES

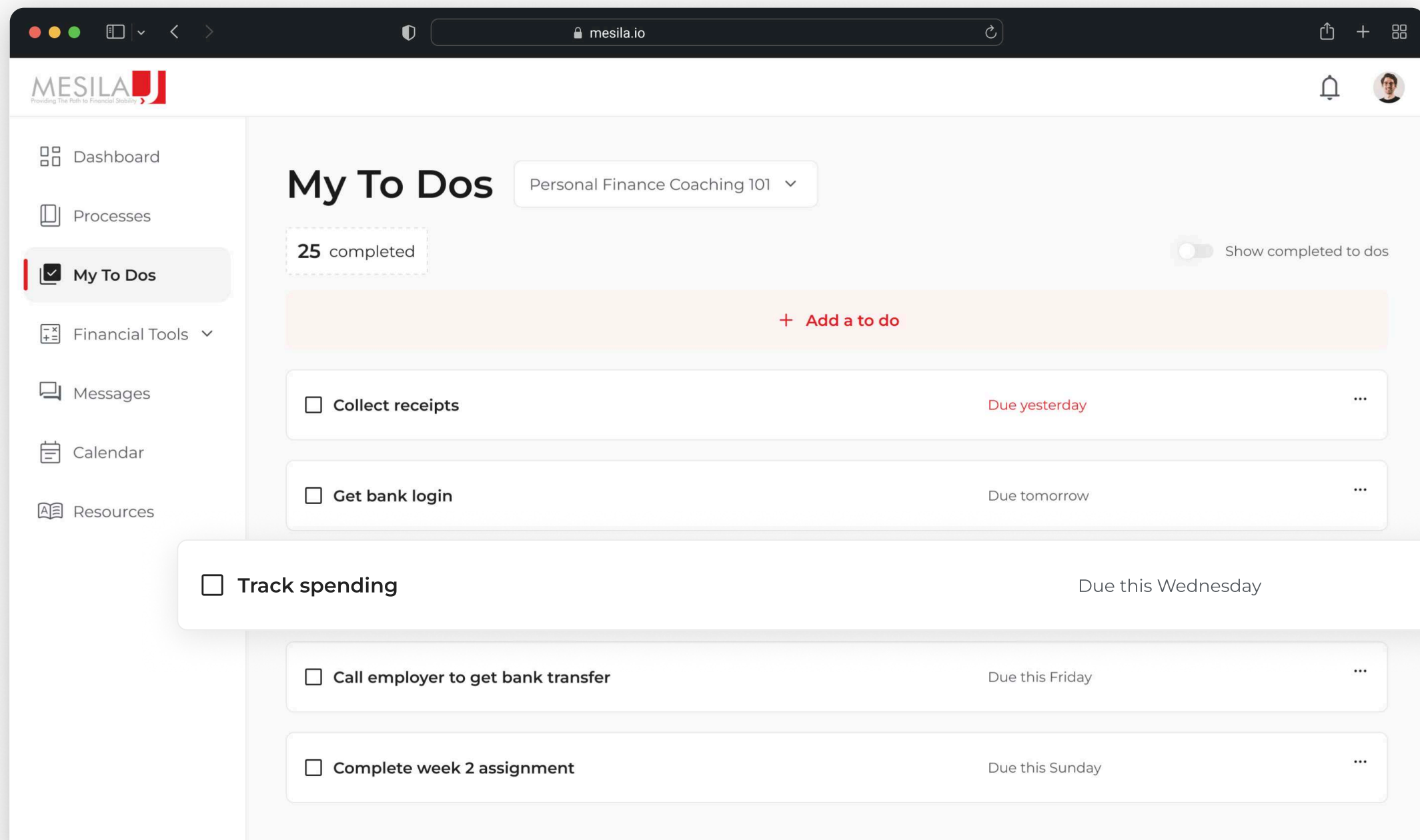
Self-paced

Processes

The platform offers two distinct learning pathways: coach-led Processes and self-paced Courses. Processes provide structured, guided learning experiences with dedicated coaches. Courses offer flexibility, allowing users to learn at their own pace and independently explore the material.

My To Dos

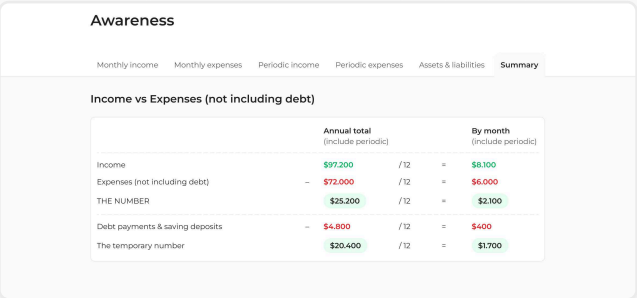
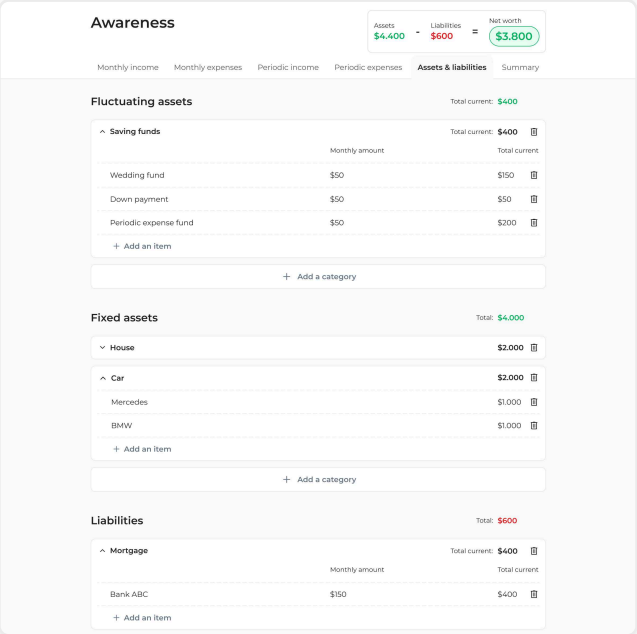
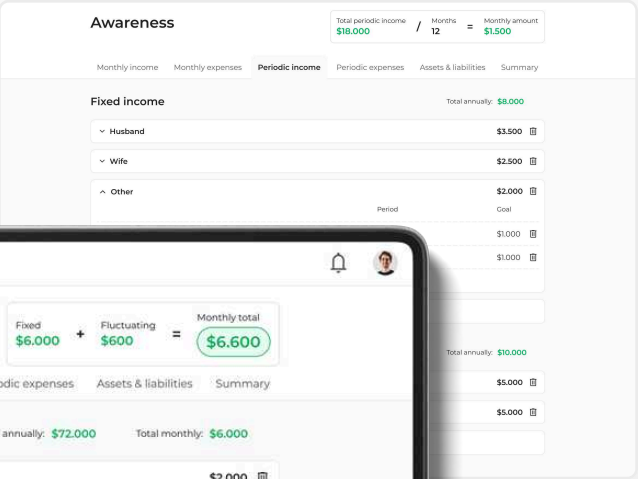
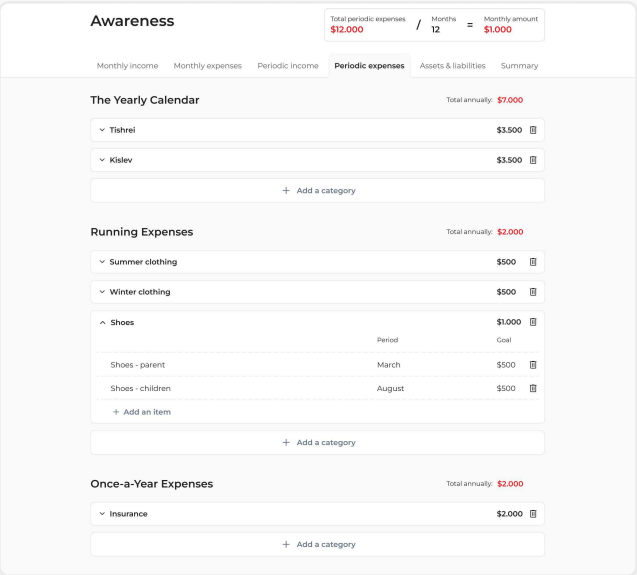
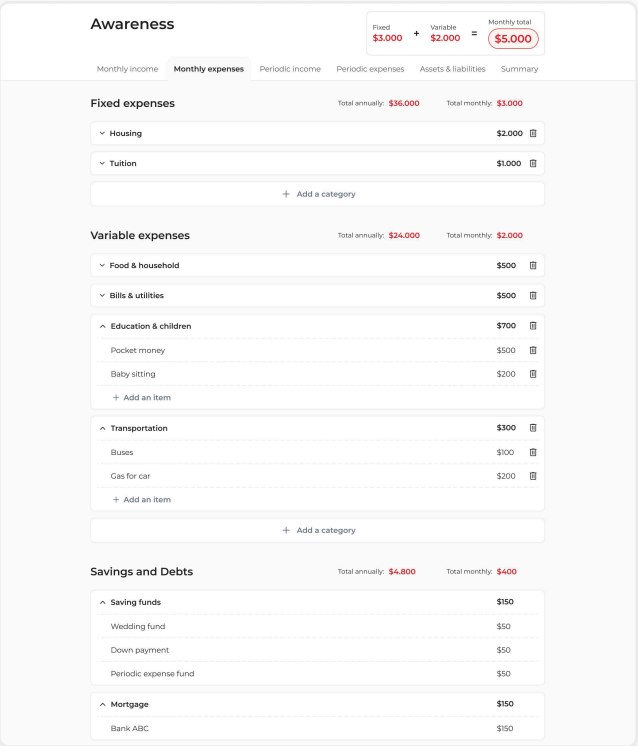
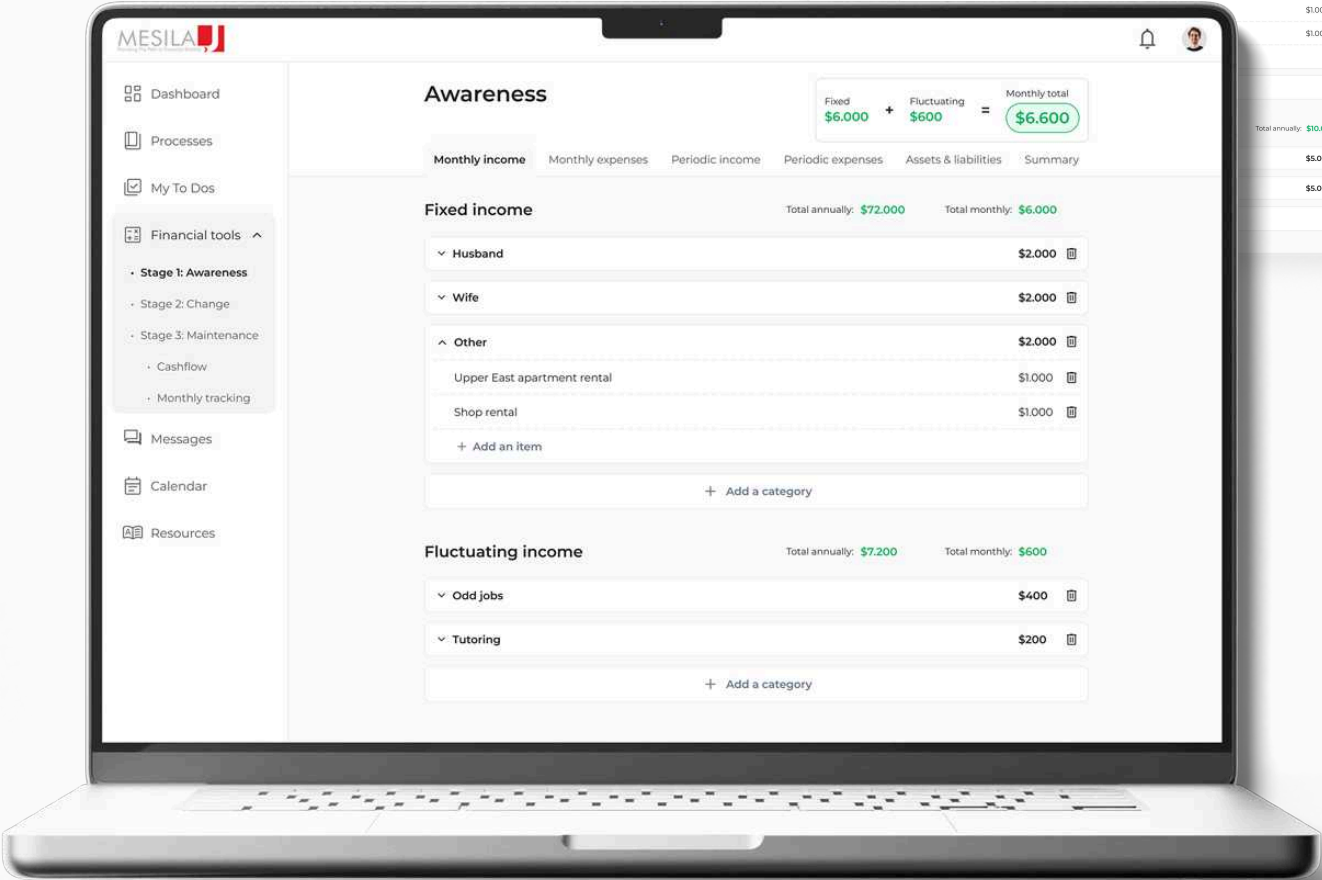
The My To-Dos section serves as a centralized task management tool. Users can add their own tasks or receive them from their coach. They can easily view their assigned tasks, set deadlines, and check off completed items, keeping them focused and motivated.



Financial Tools

STAGE 1: AWARENESS

In Stage 1 of the Financial Tool, users will track their income and expenses for 2-4 weeks and then record it in this page to gain a clear financial picture.



Change

Assets

\$4,400

Liabilities

\$600

=Net worth

\$3,800

Monthly incomeMonthly expensesPeriodic incomePeriodic expensesAssets & liabilitiesSummary

Fluctuating assets

Total monthly goal

\$300

^ Saving funds

	Target time	Total current	Goal	Monthly goal
Wedding fund	5/2034	\$150	\$6,150	\$50
Down payment	5/2054	\$50	\$36,050	\$100
Periodic expense fund	5/2044	\$200	\$36,200	\$150
+ Add an item				

+ Add a category

Fixed assets

Total

\$4,000

^ House

\$2,000

^ Car

\$2,000

Mercedes

\$1,000

BMW

\$1,000

Liabilities

Total monthly goal

\$300

^ Mortgage

Total monthly goal

\$270

^ Debts/Loan

	Target time	Total current	Goal	Monthly goal
Loan from John	3/2025	\$100	\$0	\$10
Loan from Michael	10/2024	\$100	\$0	\$20
+ Add an item				

+ Add a category

Change

Monthly incomeMonthly expensesPeriodic incomePeriodic expensesAssets & liabilitiesSummary

Income vs Expenses (not including debt)

	Annual total (include periodic)		By month (include periodic)
Income	\$115,200	/12	= \$9,600
Expenses (not including debt)	\$69,600	/12	= \$5,800
THE NUMBER	\$45,600	/12	= \$3,800
Debt payments & saving deposits	\$7,200	/12	= \$600
The temporary number	\$38,400	/12	= \$3,200

Change

Total periodic income

\$24,000

Months

12

=Monthly amount

\$2,000

Monthly incomeMonthly expensesPeriodic incomePeriodic expensesAssets & liabilitiesSummary

To edit "Currently" column go back to Stage 1.

Fixed income

Total currently receiving

\$9,000

Total goal

\$10,000

^ Husband

Total currently receiving

\$4,000

Total goal

\$4,000

^ Wife

Total currently receiving

\$2,000

Total goal

\$3,000

^ Other

	Priority	Currently receiving	Period	Goal
Tax Rebates	Low	\$1,000	May	\$1,500
Negative Income Tax	Low	\$1,000	July	\$1,500
+ Add an item				

Fluctuating income

Total currently receiving

\$13,000

Total goal

\$14,000

^ Lorem ipsum

Total currently receiving

\$5,000

Total goal

\$5,000

^ Dolor sit amet

Total currently receiving

\$8,000

Total goal

\$9,000

+ Add a category

Change

Fixed

\$7,000

+Fluctuating

\$600

=Monthly total

\$7,600

Monthly incomeMonthly expensesPeriodic incomePeriodic expensesAssets & liabilitiesSummary

To edit "Currently" column go back to Stage 1.

Fixed income

Total currently receiving

\$6,000

Total goal

\$7,000

^ Husband

Total currently receiving

\$2,200

Total goal

\$2,300

^ Wife

Total currently receiving

\$2,000

Total goal

\$2,300

^ Other

	Priority	Currently receiving	Goal
Upper East apartment	Low	\$500	\$500
Income from lorem ipsum	Med	\$500	\$1,000
Income from lorem ipsum	High	\$500	\$500
Income from lorem ipsum	Med	\$500	\$500
+ Add an item			

Fluctuating income

Total currently receiving

\$600

Total goal

\$600

^ Odd jobs

Total currently receiving

\$400

Total goal

\$400

^ Tutoring

Total currently receiving

\$200

Total goal

\$200

+ Add a category

Change

Total periodic expenses

\$12,000

Months

12

=Monthly amount

\$1,000

Monthly incomeMonthly expensesPeriodic incomePeriodic expensesAssets & liabilitiesSummary

To edit "Currently" column go back to Stage 1.

The Yearly Calendar

Total currently spending

\$9,000

Total goal

\$7,000

^ Tishrei

Total currently spending

\$2,000

Total goal

\$5,000

^ Kislev

Total currently spending

\$2,000

Total goal

\$2,000

+ Add a category

Running Expenses

Total currently spending

\$2,000

Total goal

\$2,000

^ Summer clothing

Total currently spending

\$500

Total goal

\$500

^ Winter clothing

Total currently spending

\$500

Total goal

\$500

^ Shoes

	Priority	Currently spending	Period	Goal
Shoes - parent	Low	\$500	March	\$500
Shoes - children	Med	\$500	August	\$500
+ Add an item				

Once-a-Year Expenses

^ Insurance

Reduction in Work Productivity

^ Lorem ipsum

Financial Tools

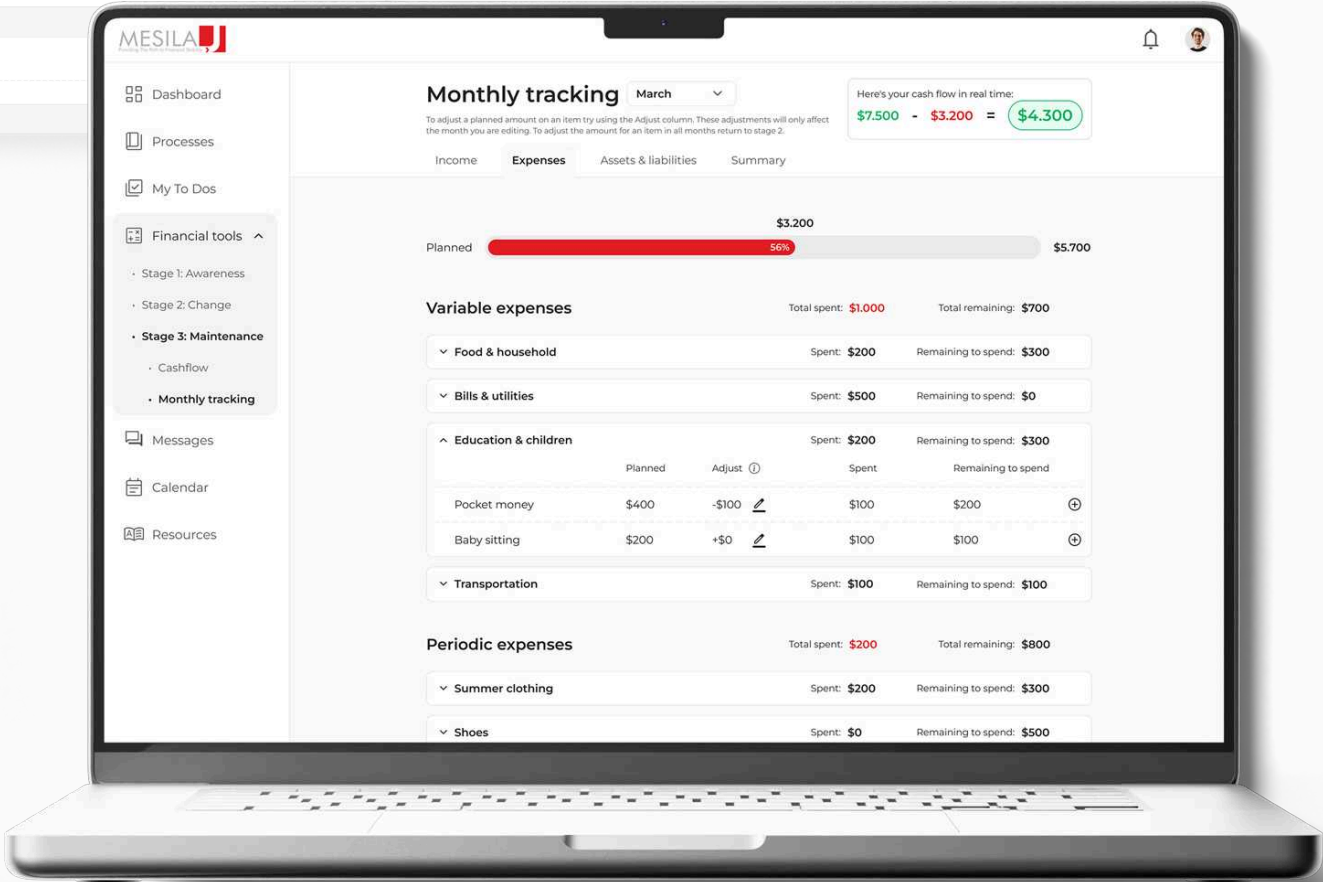
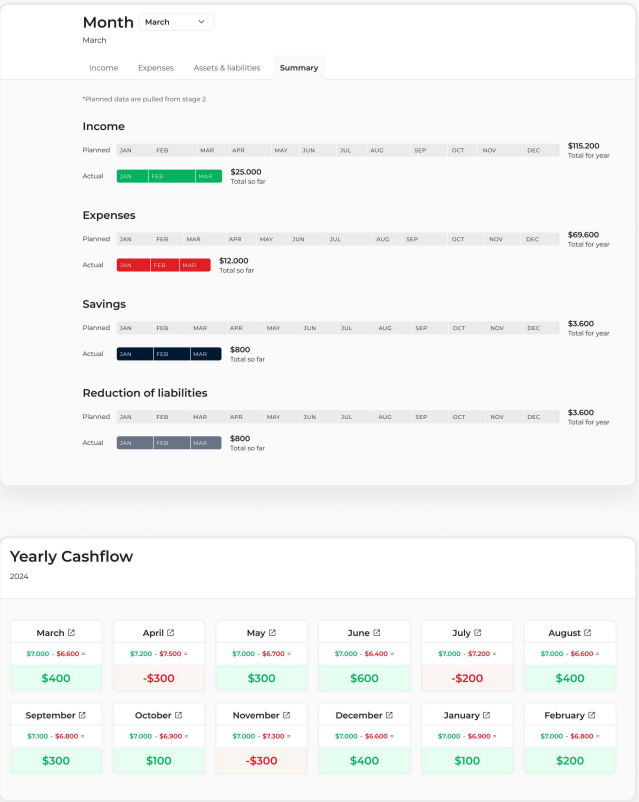
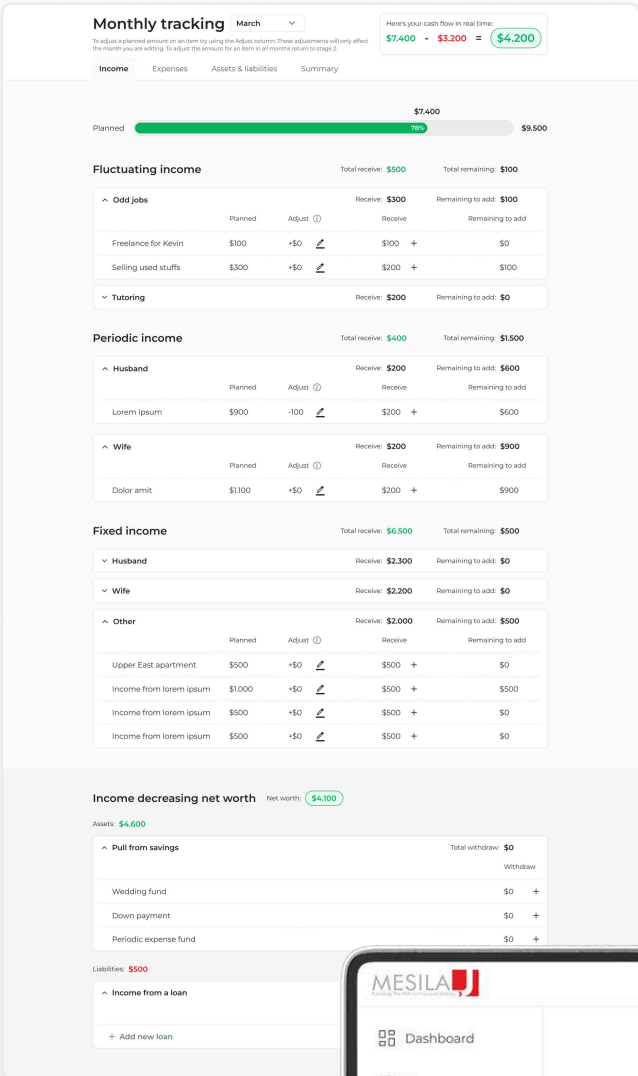
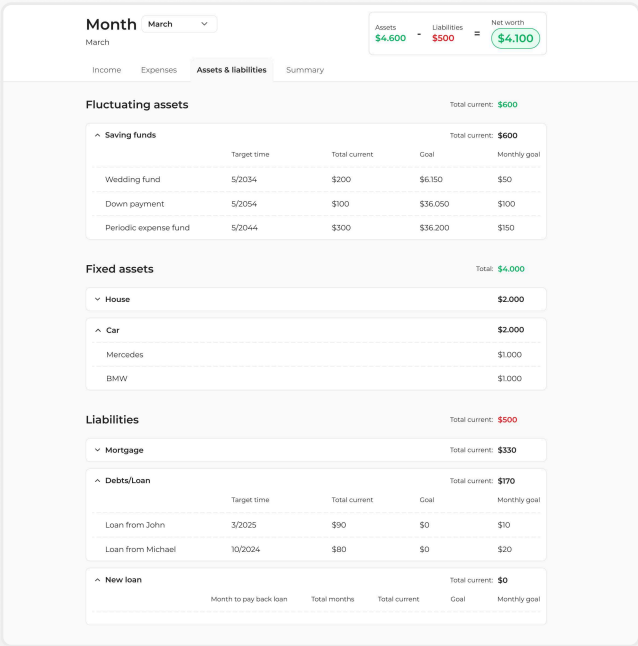
STAGE 2: CHANGE

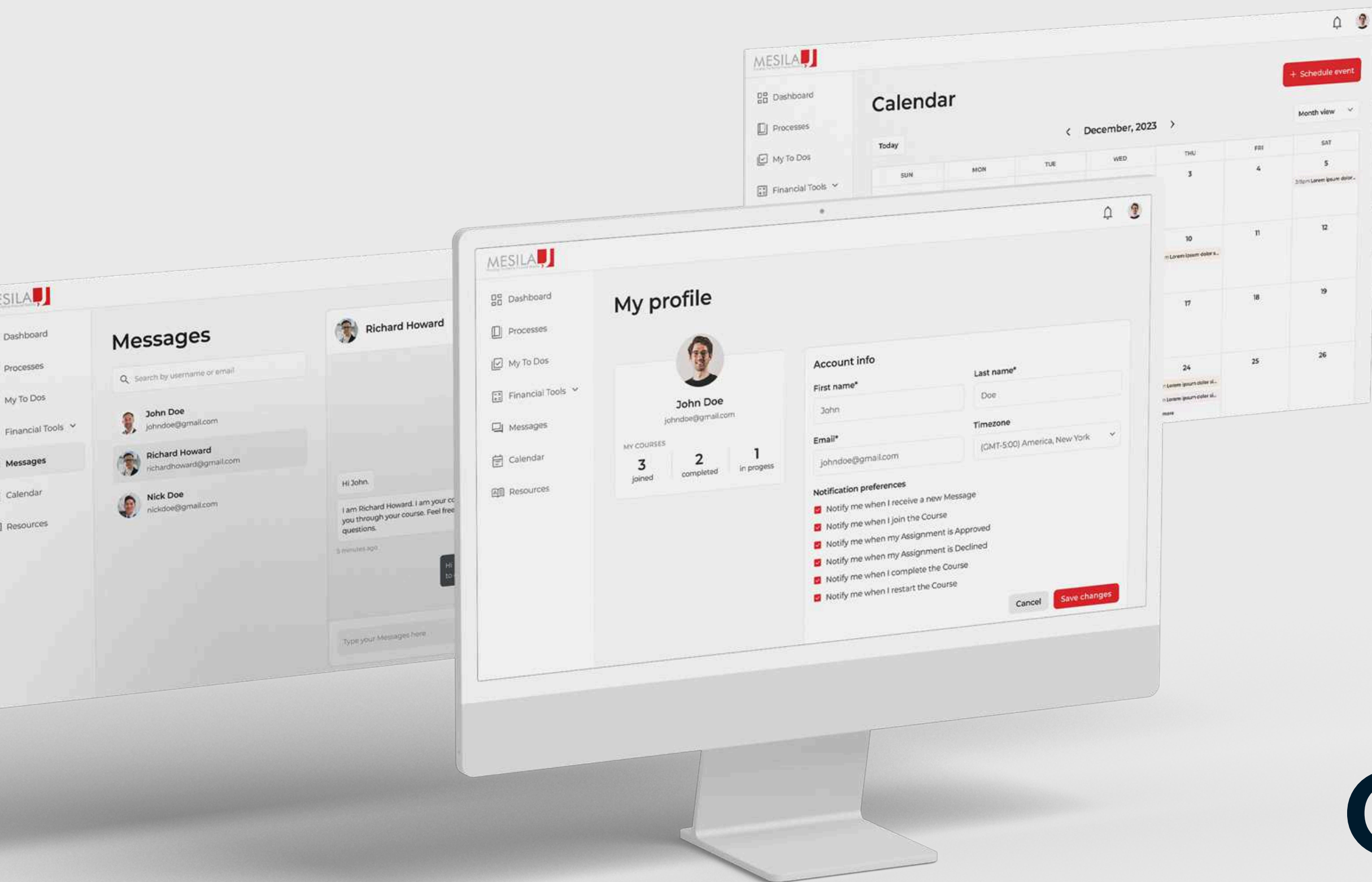
Next, users will progress to Stage 2 where they set financial goals for their income and expenses. They can also add new items or remove irrelevant ones.

Financial Tools

STAGE 3: MAINTENANCE

Finally, in Stage 3, based on the Goal set in Stage 2, users will track their future income and expenses. By monitoring their financial progress, users can ensure they are on track to achieve their goals and make necessary adjustments as needed.

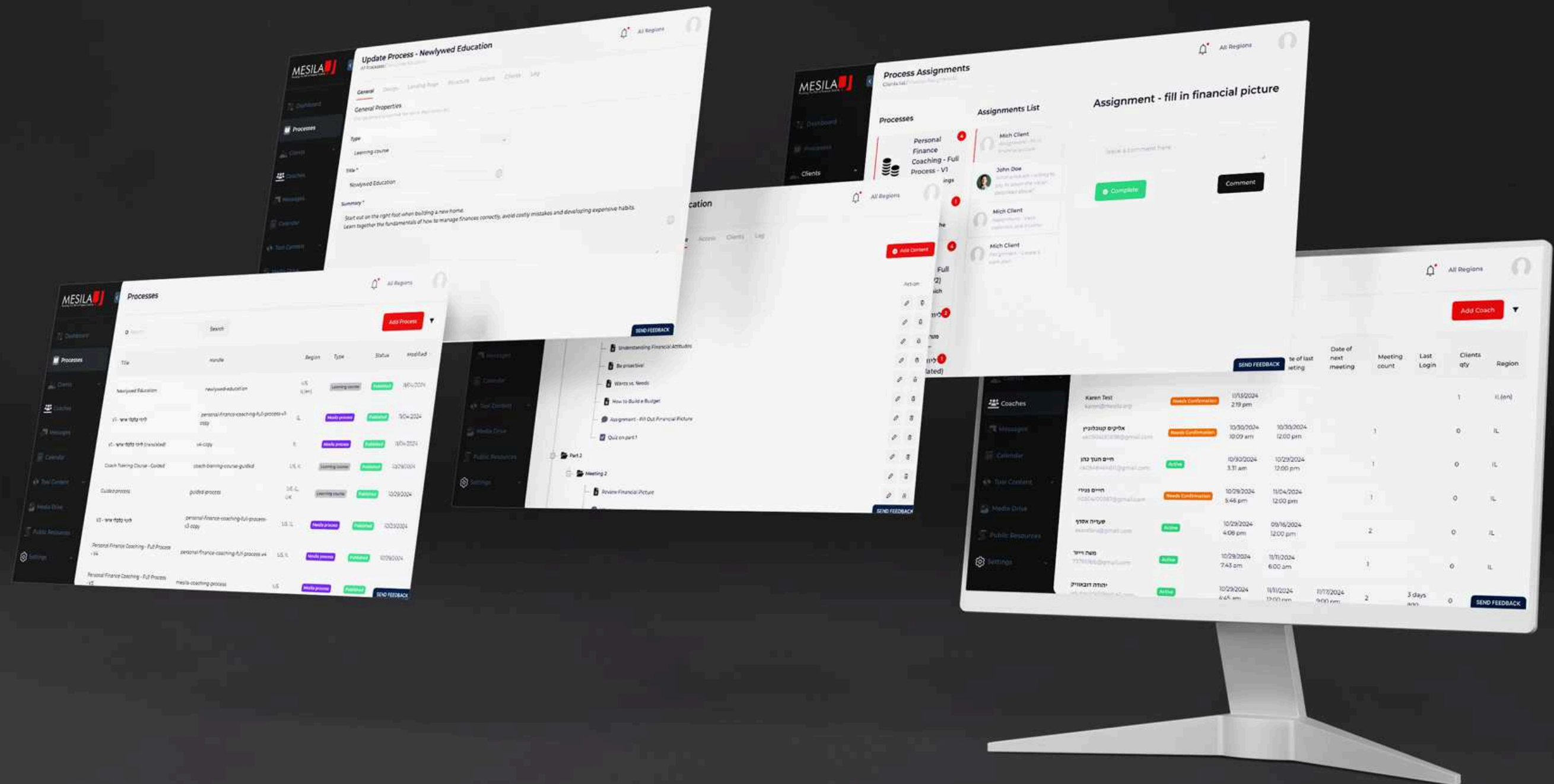




Other Features

Backend

To efficiently manage courses, user profiles, coach profiles and assignments, we developed a robust backend interface. This platform provides a centralized hub for administrators to add, edit, and delete courses, manage user/coach accounts, and assign coaches to specific learner.



Thank you