

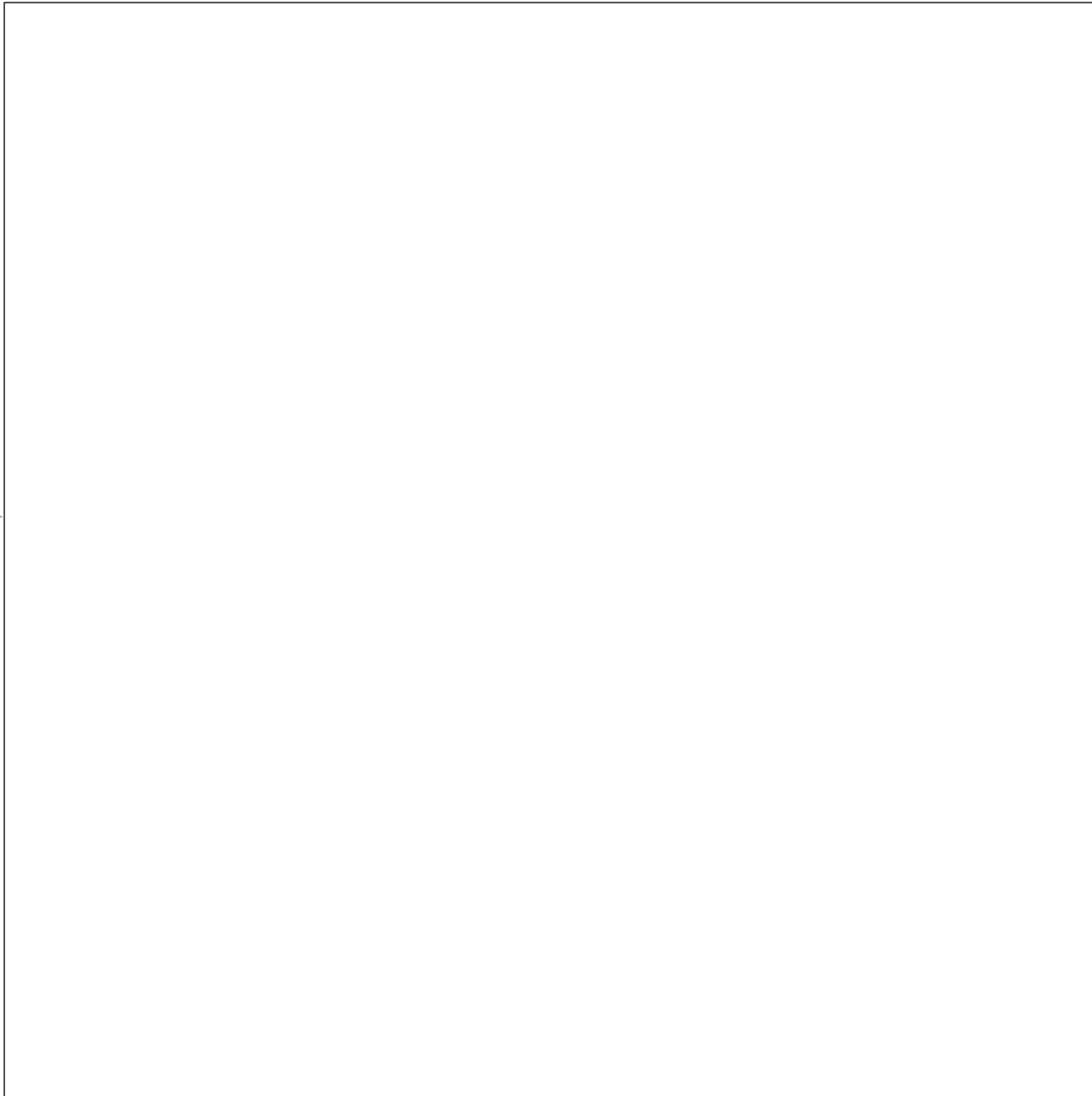
Wireframe Templates

WireframeTemplate_v2.graffle

Last modified by Matthew Weber
on Sat Jun 21 2014
matthew@conjurehq.com

Feel free to share.





Notes

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1 Callout Title

Description of what is being called out here.

450px



OurInterview Home Interview Analysis

John D. Interview

Add Note:

STUDY:
Banker Cohort Study

PARTICIPANT:
John D.
John has been using Engage Banking for 14 years. He is an architect with a wife and two young children, living in northern New Jersey.

FRI OCT 30 2018 3:30PM

★ He has been interested in annuity products, but wasn't sure if it was best for his situation. Decided not to go down the "rabbit hole of another financial product again". Instead, he has been working with investment planner that work provided to him.

★ Already owns some life insurance product, he is not sure what kind

RACHEL BAUMANN WROTE:

★ Some similarities with Amy B, we may want to define a new cohort. Perhaps a separate type of product? Family needs are unique but may be more widespread than we had thought.

★ Interesting, has used mobile phone to do in depth financial product comparisons, and even had good things to say about it. Would like to be able to take pictures of documents to add to files.

THU OCT 29 2018 2:00PM

★ John had to step away, rescheduled interview for tomorrow

★ First time home owner, moved into house three years ago. \$200,000 mortgage. Used our calculators recently while looking to refinance, but frustrated by data he didn't have easily on hand.

FOOTER

Notes

As this page is used while people are conducting interviews, there is no time for any extra steps. Everything has to be optimized for absolute user efficiency.

1 Interview Title Text Field

Defaults to "Untitled Interview", inherits name of interview participant if added (see wireframe "3.2.4.0 Metadata Panel")

2 Add Note

Two-line text input area. Confirm submit with keyboard "enter".

3 Star a Note

Used to mark a note of particular importance, may be used for reporting. Turns on or off with onClick or hitting "enter" while focused.

4 Edit Mode onMouseover

Switch to edit mode on mouseover event. Edit is confirmed by hitting enter, and is canceled by hitting escape or clicking elsewhere on page.

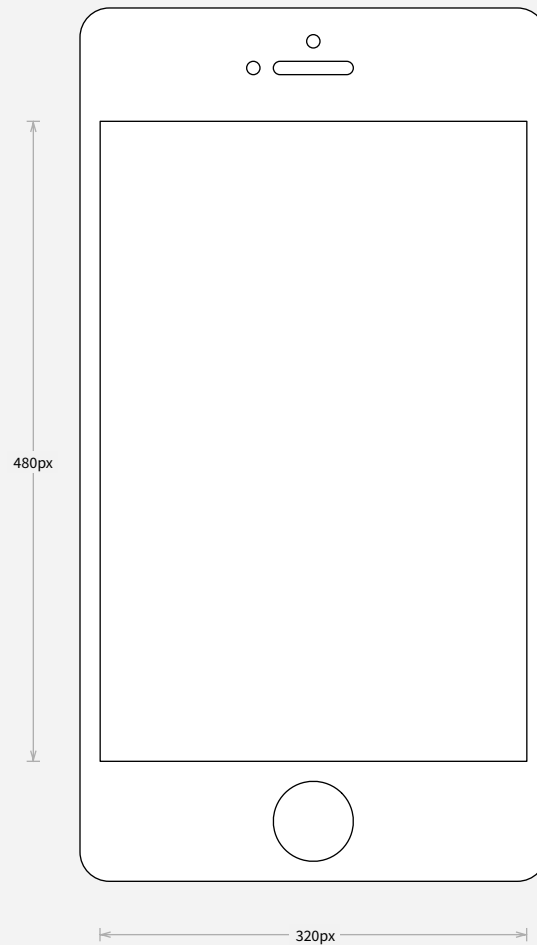


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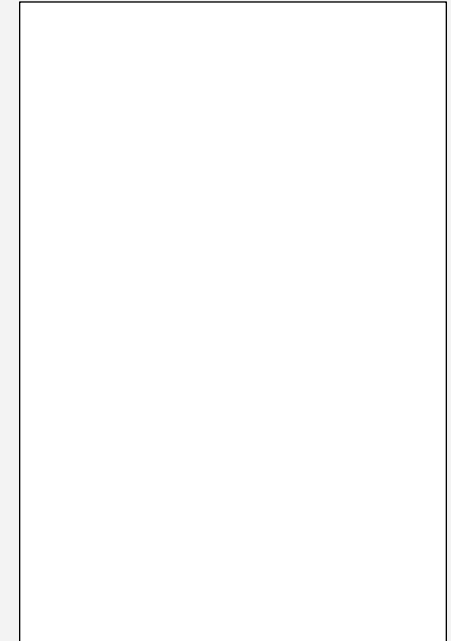
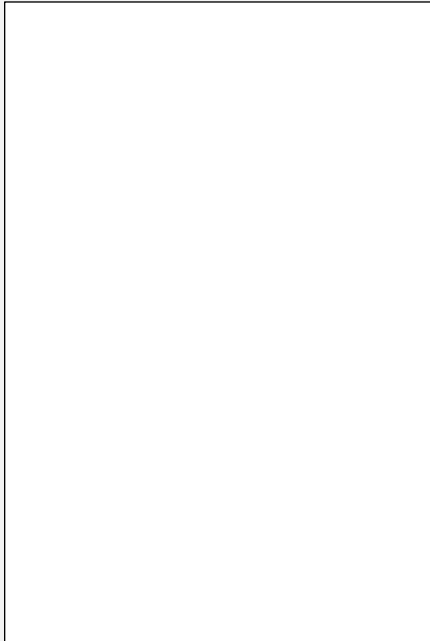
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Describe the interaction flow here.
Make the description concise, no more than two lines.



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3.1.0.0 Tablet (Portrait)

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