

# You Need a Budget 101\_Design Document

<i>Business Purpose</i>	<p>You Need a Budget (YNAB) is a popular zero-based budgeting app. While it has many loyal users, there is a learning curve to using the program effectively.</p> <p>These modules will provide new users with a basic overview of the You Need a Budget philosophy and program in order to help them better navigate the platform without overwhelm. YNAB also offers webinars and videos for deeper dives into specific topics.</p> <p>Goal: Increase the conversion rate of users during their 34-day free trial by at least 20%. Secondary goal is to identify those paying users who take this training to see if it increases retention – YNAB aims for monthly users to stay signed up for at least 9 months, and the annual user renewal rate will also increase by 20%.</p>
<i>Target Audience</i>	<p>New users of You Need a Budget, specifically those who are on their 34 day free trial. However, this course will be available to all users of the program (users may wish to review the material, and some users do fresh starts to their budget and may wish to visit this material).</p>
<i>Training Time</i>	<p>The training will be comprised of multiple modules, each approximately 15 minutes in length.</p>
<i>Training Recommendation</i>	<p>The recommendations for this training are:</p> <ul style="list-style-type: none"><li>• This course will be an eLearning module. This is the best format because it allows users of YNAB to access this information at any time and any place.</li><li>• This training will be recommended to all new users signed up to YNAB. This includes those on their free trial, users on a student trial, and new paid sign-ups.</li><li>• This training will be followed by YNAB's existing webinars and video series for those who want additional practice and to dive deeper into specific topics.</li></ul>
<i>Deliverables</i>	<p>1 eLearning course:</p> <ul style="list-style-type: none"><li>• developed in Articulate Storyline</li><li>• voiceover narration</li><li>• approximately 10-15 slides of content per module</li></ul>
<i>Learning Objectives</i>	<p>By the end of the module, learners will be able to:</p> <ul style="list-style-type: none"><li>• apply the YNAB Four Simple Rules for Successful Budgeting to their own budget.</li><li>• navigate the YNAB interface (desktop and mobile) and build their budget.</li><li>• use the features of YNAB in order to make their budget work for them.</li></ul>
<i>Learner Outcomes</i>	<p>Learners (mostly new users to YNAB) will maintain their subscriptions for 9-12 months due to their increased abilities to use the YNAB software.</p>

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<i>Training Outline</i>	<ol style="list-style-type: none"><li>1) <b>Cover Slide</b></li><li>2) <b>Navigation</b></li><li>3) <b>Introduction of YNAB/What is Zero-Based Budgeting?</b></li><li>4) <b>Contents/Objectives</b><ul style="list-style-type: none"><li>• 4 Rules of Successful Budgeting</li><li>• Building Your Budget in YNAB</li><li>• Making YNAB Work for You<ol style="list-style-type: none"><li>a) <b>Module 1: 4 Rules of Successful Budgeting</b><ul style="list-style-type: none"><li>• Introduction</li><li>• Give Every Dollar a Job</li><li>• Embrace Your True Expenses</li><li>• Roll with the Punches</li><li>• Age Your Money</li><li>• Impact of Using the Rules</li></ul></li><li>b) <b>Module 2: Building Your Budget in YNAB</b><ul style="list-style-type: none"><li>• Introduction</li><li>• Gathering Your Information</li><li>• Creating a budget<ul style="list-style-type: none"><li>• Adding Budget Items (w/examples)</li><li>• Adding Accounts (types of accounts)</li></ul></li><li>• Budgeting Your Money<ul style="list-style-type: none"><li>• Setting Goals</li><li>• Budgeting Ahead</li></ul></li></ul></li><li>c) <b>Module 3: Making YNAB Work for You</b><ul style="list-style-type: none"><li>• Introduction</li><li>• Checking Your Balances</li><li>• Adding Transactions/WAM</li><li>• Reconciling</li><li>• Using Credit Cards</li><li>• Tracking Accounts</li><li>• Reports</li></ul></li></ol></li><li>5) <b>Summary</b></li><li>6) <b>Completion</b></li></ul></li></ol>
<i>Evaluation Plan</i>	YNAB will review data across the three populations: trial users, monthly subscribers, and annual subscribers over the next quarter to determine whether this training has impacted retention rates.