En el capítulo anterior de I&E…

Creación de oportunidades.

Un rápido repaso de la clase anterior

- Product y customer development
  - Formas complementarias de generar valor.
- Competir es el proceso de encontrar una ventaja competitiva.
- Los modelos competitivos pueden ser muy sofisticados o intuitivos
  - Basados en la innovación
  - Basados en el modelo de negocio
  - Idealmente entrelazados.

¿Qué hicimos en las últimas dos semanas?

- ~~Examen Parcial~~

- ~~Primera entrega: 3 de Marzo~~

- Lo que tienen ahora mismo:
  - Problema
  - Solución
  - Perfil de sus clientes
  - Evidencia de fuentes secundarias

¿Qué viene ahora?

- Segunda Entrega: Mayo 5
- Un montón de trabajo de campo
  - Desarrollar su prototipo
  - Ponerse a hablar con la gente
  - Refinar y actualizar su prototipo
  - Profundizar en la industria/sector/mercado/segmento
  - Market Research (estimar la demanda y plan de marketing)
  - Investigación Primaria (recursos, financiamiento)
- En pocas palabras: pasar de una idea abstracta a una propuesta de valor que atraiga a los clientes, un plan para hacer realidad la idea, e indicadores concretos para los inversionistas.

Hablemos de la tarea

- Tienen que haber visto el material correspondiente a
  - Flipped Classroom 5
  - Flipped Classroom 6
- Entreguen las versiones actualizadas de sus *briefs*

INNOVACIÓN Y EMPRENDIMIENTO

Clase 8 – *Customer Research*: Personas y Journey maps

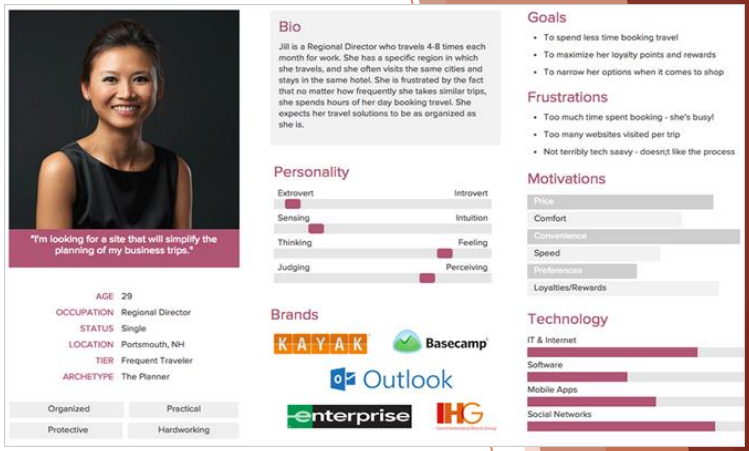
Javier A. Rodríguez-Camacho, Ph.D.

Pontificia Universidad Javeriana de Bogotá, 01-2018

Personas

¿Para quién estamos trabajando?

¿Qué es una Persona?



- Una representación abstracta de
  - Un tipo de usuario o cliente
  - Grupos de personas con necesidades similares
  - Segmentos de mercado
  - Stakeholders (Grupos de interés)
- El perfil de para quién estamos diseñando/trabajando
- Incluyen características ricas y relevantes
  - No solo datos demográficos
- Cambian y evolucionan con el tiempo

¿Qué es una Persona?

"I'm looking for a site that will simplify the planning of my business trips."

AGE	29
OCCUPATION	Regional Director
STATUS	Single
LOCATION	Portsmouth, NH
TIER	Frequent Traveler
ARCHETYPE	The Planner

Organized	Practical
Protective	Hardworking

Bio

Jill is a Regional Director who travels 4-8 times each month for work. She has a specific region in which she travels, and she often visits the same cities and stays in the same hotel. She is frustrated by the fact that no matter how frequently she takes similar trips, she spends hours of her day booking travel. She expects her travel solutions to be as organized as she is.

Personality

Extrovert	Introvert
Sensing	Intuition
Thinking	Feeling
Judging	Perceiving

Brands

KAYAK, Basecamp, Outlook, enterprise, IHG

Goals

- To spend less time booking travel
- To maximize her loyalty points and rewards
- To narrow her options when it comes to shop

Frustrations

- Too much time spent booking - she's busy!
- Too many websites visited per trip
- Not terribly tech saavy - doesn;t like the process

Motivations

Price
Comfort
Convenience
Speed
Preferences
Loyalties/Rewards

Technology

IT & Internet
Software
Mobile Apps
Social Networks

STEVE, 47

PERSONA PROFILE

Who is he?

- CEO of large financial company worth € 85 million.
- Has been in this role for ten years.
- **He is an innovator and isn't afraid to take risks.**
- He likes to communicate via email or face-to-face. He is on LinkedIn and Twitter.
- He reads financial and economic publications and attends financial conferences.

How he finds us

- He was referred onto by someone he trusts.
- He comes to the website at the beginning of his buying journey.
- He isn't interested in using the information on the site beyond research.

Pain points

- The size of the service team is very important to him.
- There are five other people involved in the buying decision.
- He wants a competitive price with strong experience.

What he wants to know

- Latest projects
- Expertise
- Testimonials
- Awards
- He is looking for a partner-led approach

What he doesn't want

- He doesn't want to pay large fees. Value for money is important.

Why he buys from us?

Price and Expertise

SERVICE TEAMS

BRIGHTSPARK Consulting

Creemos ahora sus Personas

- Recibirán un formato

NAME

DEMOGRAPHICS

PERSONALITY

MOTIVATIONS

INTERESTS

HOW SHE SOLVES THE PROBLEM TODAY

GOALS

FRUSTRATIONS

CURRENT SATISFACTION			
LOW	MEDIUM	HIGH	VERY HIGH

HOW SHE FINDS THEM	
Physical	Info

SWITCHING COST			
LOW	MEDIUM	HIGH	VERY HIGH

WHY?

ROLE

REASONS FOR BUYING/USING

HOW SHE FIND US	
Physical	Info

CHALLENGES USING

FEARS USING

EXTRAS (+)

NOT WANTS (-)

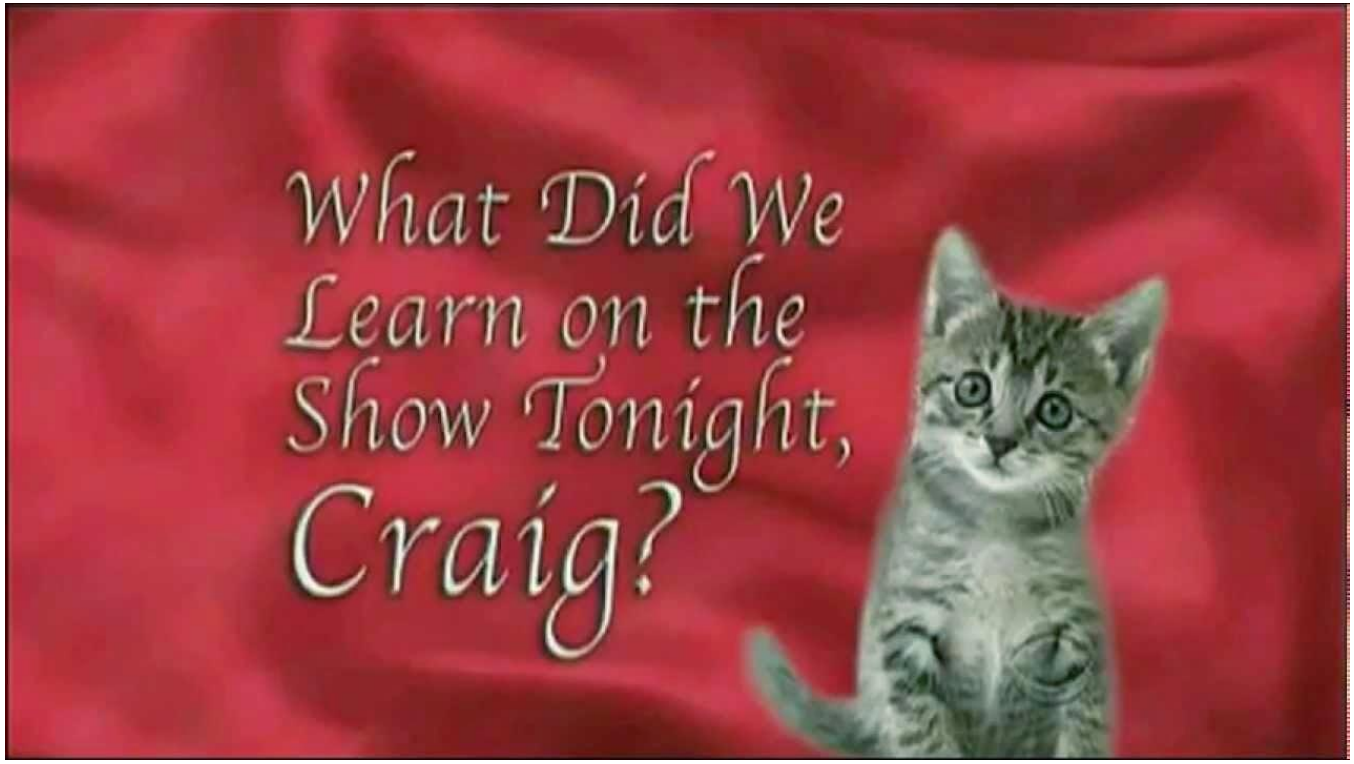
Rodríguez-Camacho 2018

Creemos ahora sus Personas

- Recibirán un formato
- En sus equipos preparen todas las Personas que necesiten para sus proyectos
- Tienen 10 minutos para completarlas
  - ¡Sean serios, realistas y detallados!
- Presentarán sus Personas a la clase.

Hora de compartir con todos sus Personas

¿Voluntarios?



¿Qué aprendimos sobre Personas?

NAME

DEMOGRAPHICS

PERSONALITY

MOTIVATIONS

INTERESTS

HOW SHE SOLVES THE PROBLEM TODAY

GOALS

FRUSTRATIONS

CURRENT SATISFACTION

LOW	MEDIUM	HIGH	VERY HIGH

HOW SHE FINDS THEM

Physical

Info

SWITCHING COST

LOW	MEDIUM	HIGH	VERY HIGH

WHY?

ROLE

REASONS FOR BUYING/USING

HOW SHE FIND US

Physical

Info

CHALLENGES USING

FEARS USING

EXTRAS (+)

NOT WANTS (-)

Rodríguez-Camacho 2018

¿Por qué crear Personas?

- Una herramienta ficticia pero útil para entender las necesidades de los clientes
- Nos ayudan a comprender las necesidades y deseos de los usuarios, sus frustraciones y fuentes de valor (invisibles)
- Los diseñadores los pueden usar para probar hipótesis
- Deben crearse usando datos obtenidos del mundo real
- Re-enfocar, mejorar o redefinir elementos de nuestro negocio : ¡APRENDER!

Tarea I

- En sus equipos refinen y completen las Personas de sus proyectos
- Usen tantos datos reales como sea posible
- Todavía no hablen con sus clientes potenciales, pero ténganlos muy en mente
- Lo entregarán la próxima clase

Competitive Outlook

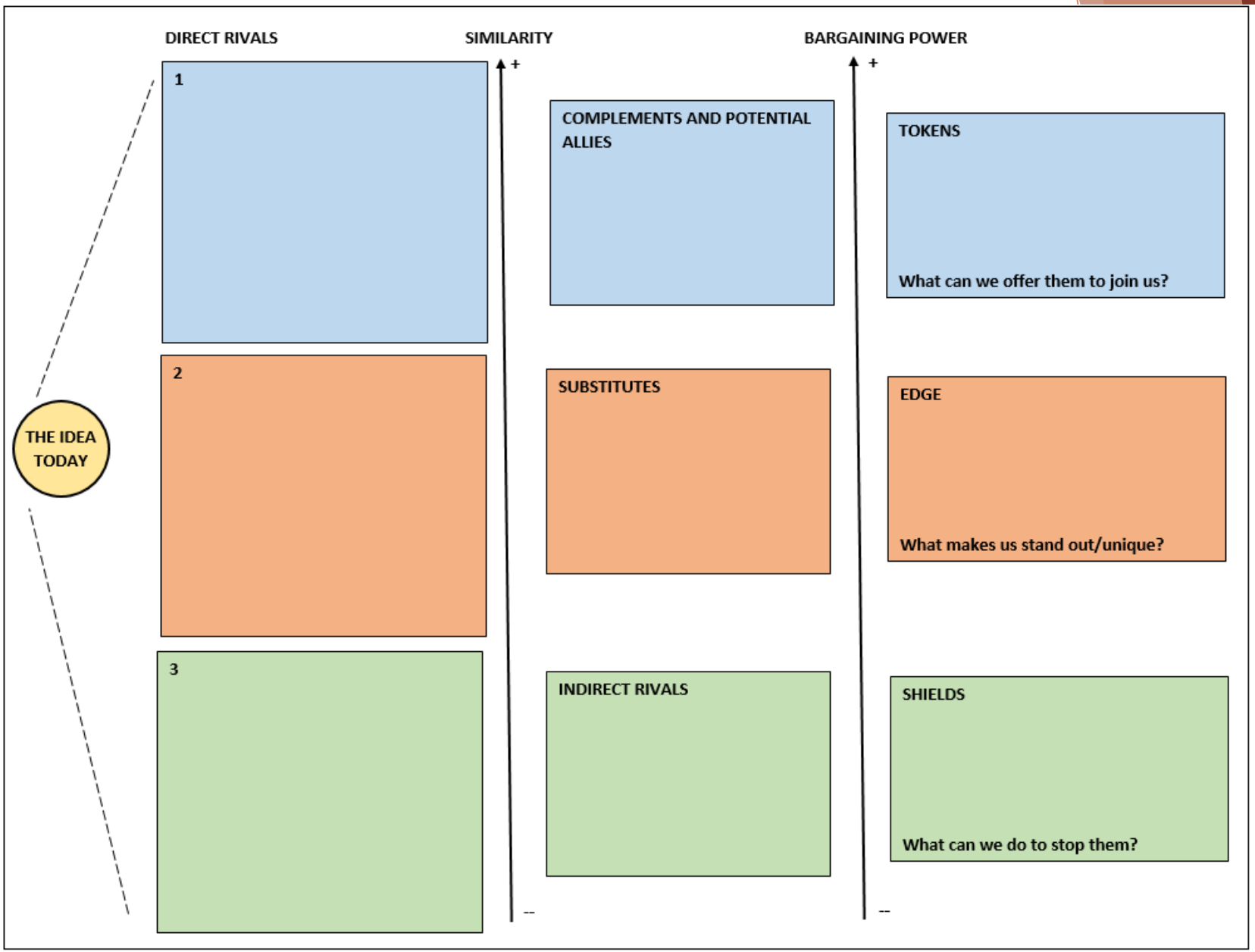
¿Dónde nos encontramos y con quiénes nos medimos?

¿Qué es un Competitive Outlook?

- La primera aproximación al segmento/mercado/sector/industria en la que van a entrar
- Un identikit general de sus principales competidores, aliados, etc.
- Se crean usando datos secundarios

Mapeemos sus Competitive Outlooks

- No hay una receta pero les daré un formato que puede serles útil



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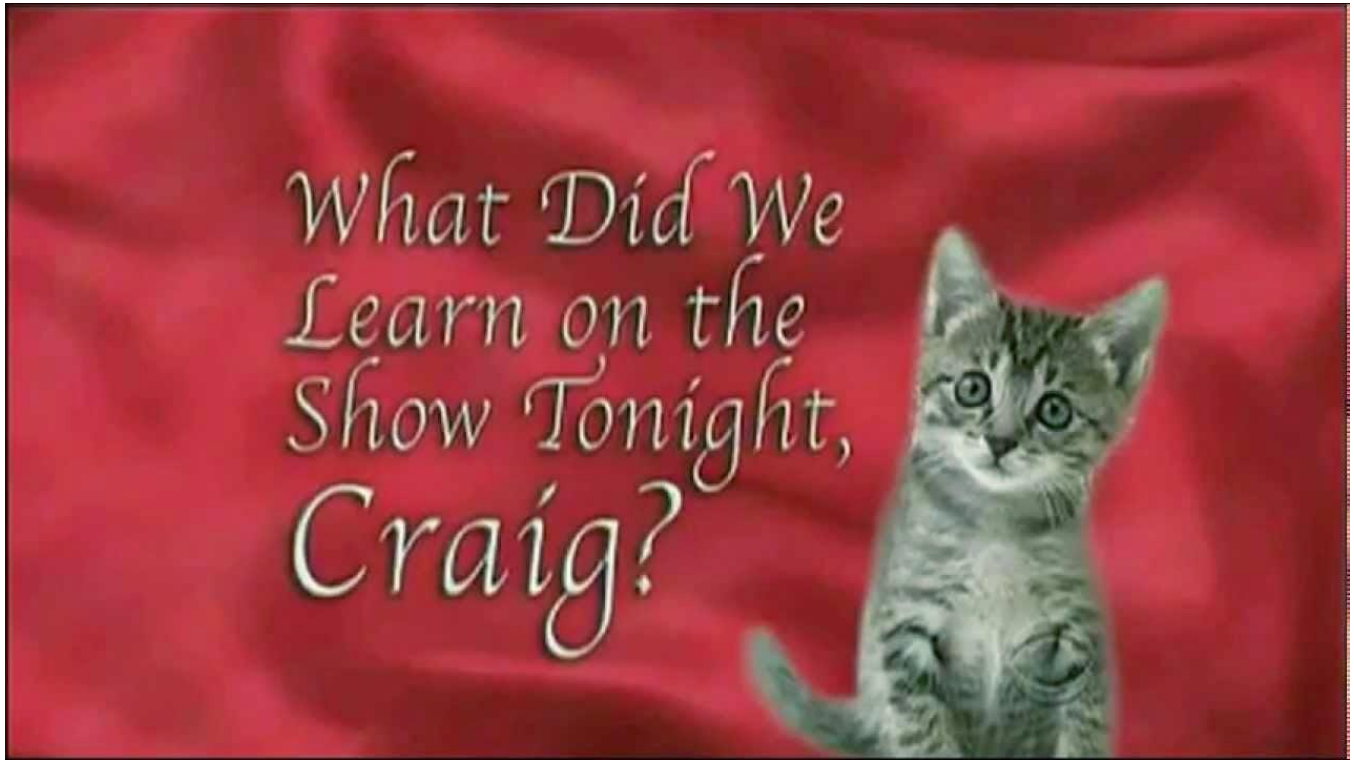
Mapeemos sus Competitive Outlooks

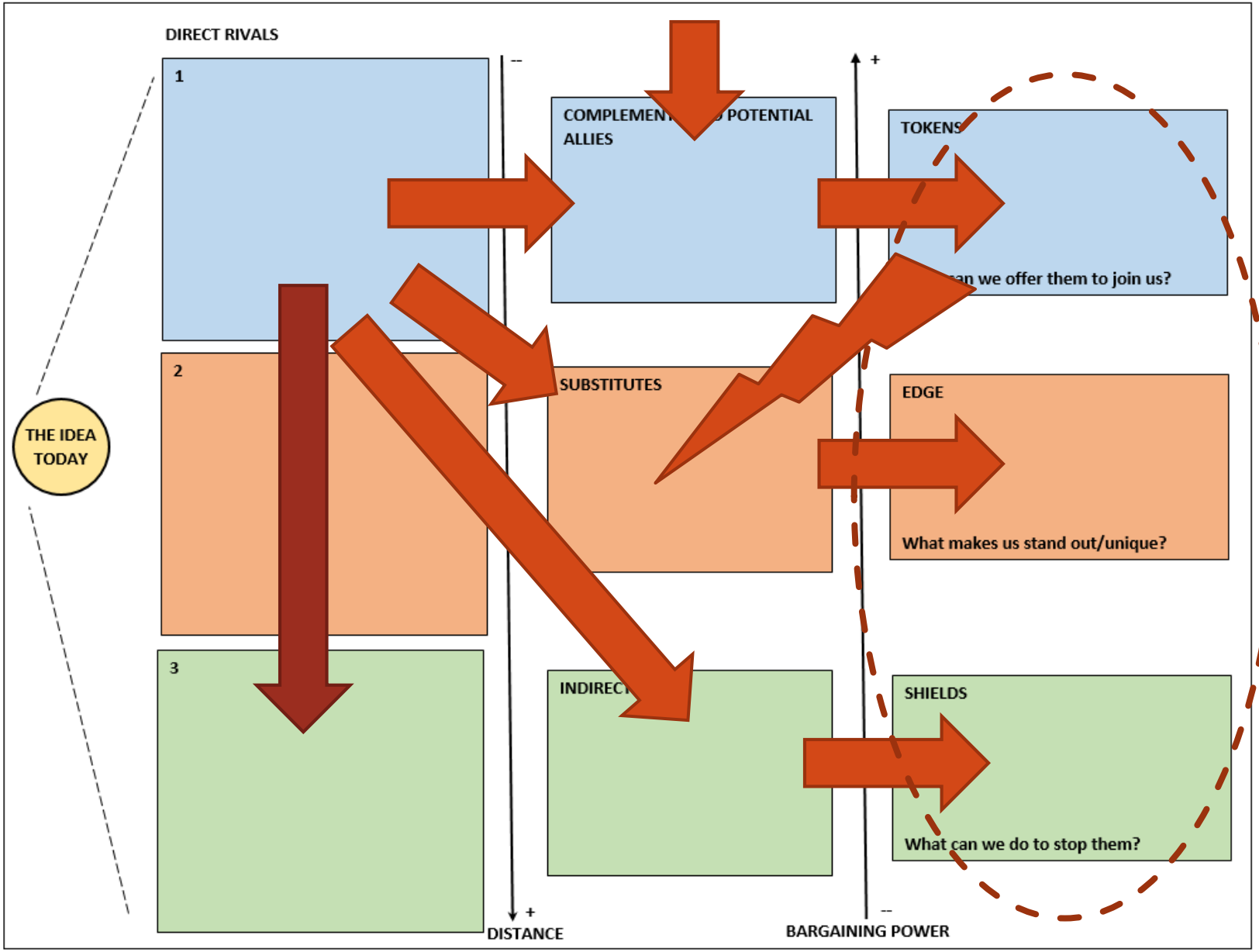
- No hay una receta pero les daré un formato que puede serles útil
- Completen el formato en sus equipos
- Reflexionen sobre sus proyectos y usen datos de fuentes secundarias si es necesario
- Tienen 10 minutos para completar el formato
- Lo presentarán después a la clase

Hora de contarnos sobre sus competidores

¿Voluntarios?



¿Qué aprendimos sobre sus Competitive Outlooks?



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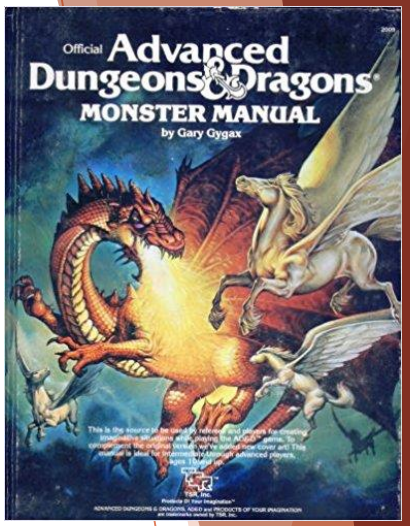
¿Por qué es útil realizar este análisis?

- Solo se trata de un retrato instantáneo pero la realidad no estática
- El siguiente paso consiste en elegir algunos y enfocarse en ellos
  - Averiguar todo lo que se pueda sobre ellos
  - Usar fuentes primarias es razonable en este punto
  - Pueden aplicar algunas técnicas que ya conocen.
- No basta con saber el nombre de nuestros “rivales”
- Lo importante es qué hacen al respecto!
  - Acabo de mostrarles un atajo.

El modelo TES



- TES : Tokens, Edge, Shields
  - Tokens: Aquello que pueden ofrecerle a competidores cercanos para convertirlos en aliados.
  - Edge: Los atributos clave generadores de valor de su servicio o producto.
  - Shields: Las barreras inherentes y cómo pueden preservarlas.
- Los atributos generadores de valor serán la semilla de sus Propuestas de Valor
  - Estos atributos deben ser definidos por los clientes.

Flipped Classroom 7

- Algunos vídeos sobre cómo realizar una investigación competitiva
- Herramientas y técnicas que ya conocen (incluso varias otras)

Tarea II

- Completen en sus equipos el Modelo TES
- Vean los vídeos del Flipped Classroom 7 videos
- Presentarán los resultados de su análisis competitivo la próxima clase
  - No solamente los nombres de sus rivales: ¡Qué van a hacer!

Customer Journey Maps

¿Por qué son útiles?

¿Qué es un Customer Journey Map?

- Una herramienta visual que conecta distintos aspectos de la experiencia del cliente
  - Sus metas,
  - Interacciones y comunicaciones con nostros,
  - Canales,
  - Reacciones emocionales,
  - Etc.

Columbia Road

Customer Journey Map

Example of an online grocery store

Stage	Awareness	Consideration	Decision		Delivery & Use			Loyalty & Advocacy	
CUSTOMER ACTIVITIES	Hear from friends, see offline or online ad, read from newspapers	Compare & evaluate alternatives	Add groceries to a shopping cart	Make an order	Receive or pick up on order	Contact customer service	Enjoy groceries	Order again / order more	Share experience
CUSTOMER GOALS	No goals at this point	Find the best solution to buy food	Find and select products easily, get inspired	Order effortlessly	Receive / pick up an order effortlessly and when needed	Get help if problems appear, request for refund	Have right and good quality ingredients	Repeat good customer experience	Share feelings, give feedback
TOUCHPOINTS	Word of mouth, traditional media, social media	Word of mouth, website, brick & mortar store, social media		Website, app, order confirmation email	Delivery service, packing, messages (email, SMS, phone)	Phone, email, chat	Food products, packages, other materials		Word of mouth, social media
EXPERIENCE	Interested, curious	Requires effort but excited	Excited	"Payment is painful"	Requires effort, happy when received	Frustrated	Satisfied	"This is easy"	"I have to share this"
BUSINESS GOAL	Increase awareness and interest	Increase number of website visitors	Increase shopping cart value & conversion rate	Increase online sales and conversion rate	Deliver on time and minimize a delivery window	Increase customer service satisfaction, minimize waiting	Make products to match expectations	Increase retention rate and order value / frequency	Turn customers to advocates, turn negative experiences to positive
KPI	Number of people reached	New website visitors	Shopping cart value, conversion rate	Online sales, conversion rate	On time delivery rate, average delivery window	Customer service success rate, waiting time	Product reviews	Retention rate, order value & frequency	Viral coeffient, customer satisfaction
ORGANISATIONAL ACTIVITIES	Create marketing campaigns and content both offline and online, PR	Create marketing campaigns and content both offline and online	Optimize grocery shopping experience	Optimize online purchase funnel, order handling	Picking & delivery	Organize customer service	Develop products & product range	Target marketing, make re-ordering easy, upselling / cross-selling	Manage feedback and social media, develop sharing / inviting chances
RESPONSIBLE	Marketing & Communications	Marketing & Communications	Online development, Customer service	Online development, Warehouse, Logistics	Warehouse, Logistics	Customer service	Product development, Purchasing	Marketing, Online development	Customer service, Online development

www.columbiaroad.com

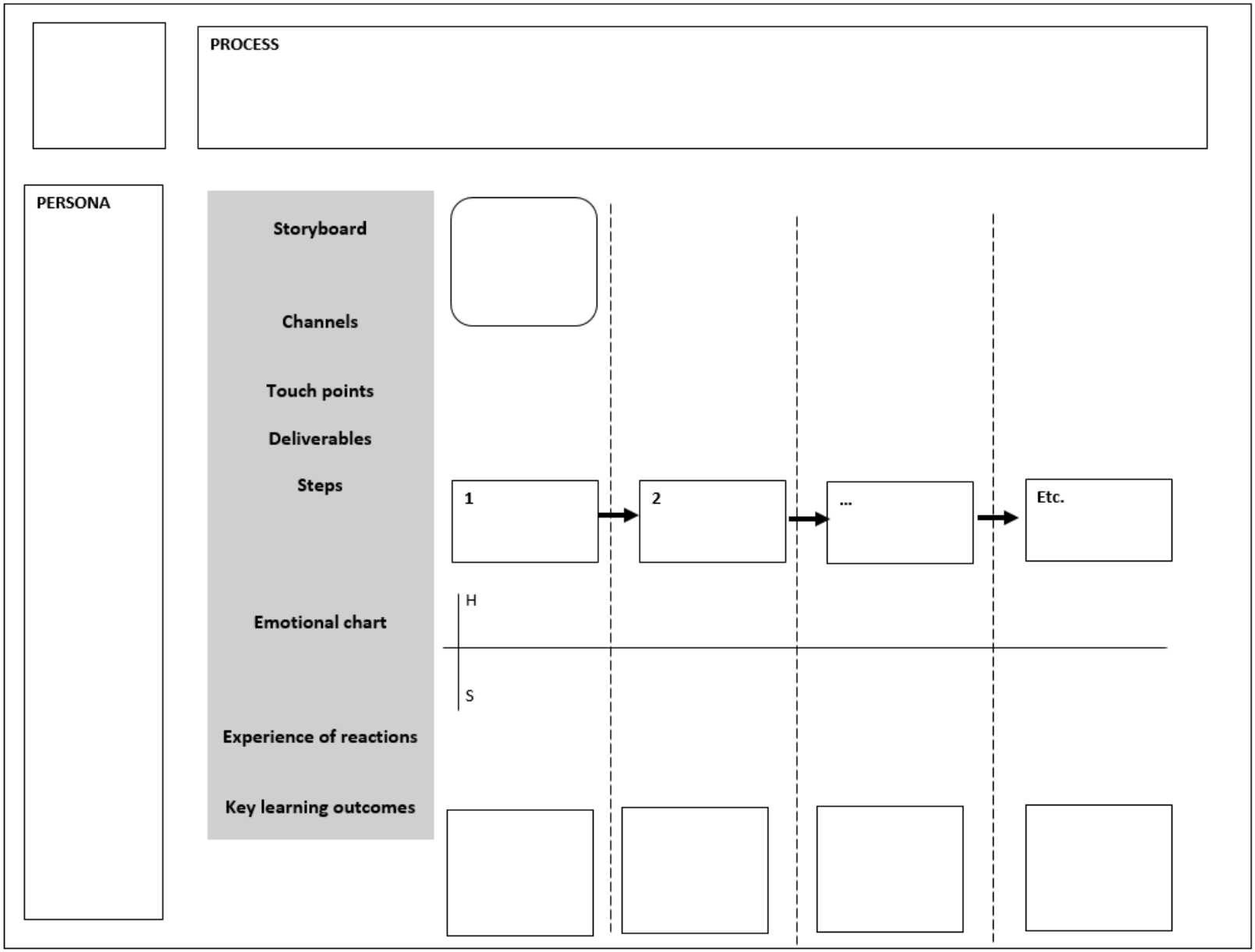
¿Qué es un Customer Journey Map?

- Una herramienta visual que conecta distintos aspectos de la experiencia del cliente
  - Sus metas,
  - Interacciones y comunicaciones con nostros,
  - Canales,
  - Reacciones emocionales,
  - Etc.

- Es un esbozo, un mapa, un modelo
- Son sencillos pero pueden tener varios niveles o etapas
- Deben respaldarse con datos
- La idea es que sean útiles, no perfectos!

Construyamos sus Customer Journey Maps

- Recibirán un pliego de papel y marcadores
- En sus equipos preparen el journey map para una de sus personas
- Elijan una sola persona y etapa del journey (si tienen varias)
- Incluyan:
  - Pasos, Canales, Mapa emocional, Resultados de aprendizaje clave
- Tienen 15 minutos para completar el ejercicio
- Lo compartirán con la clase una vez esté terminado



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Construyamos sus Customer Journey Maps

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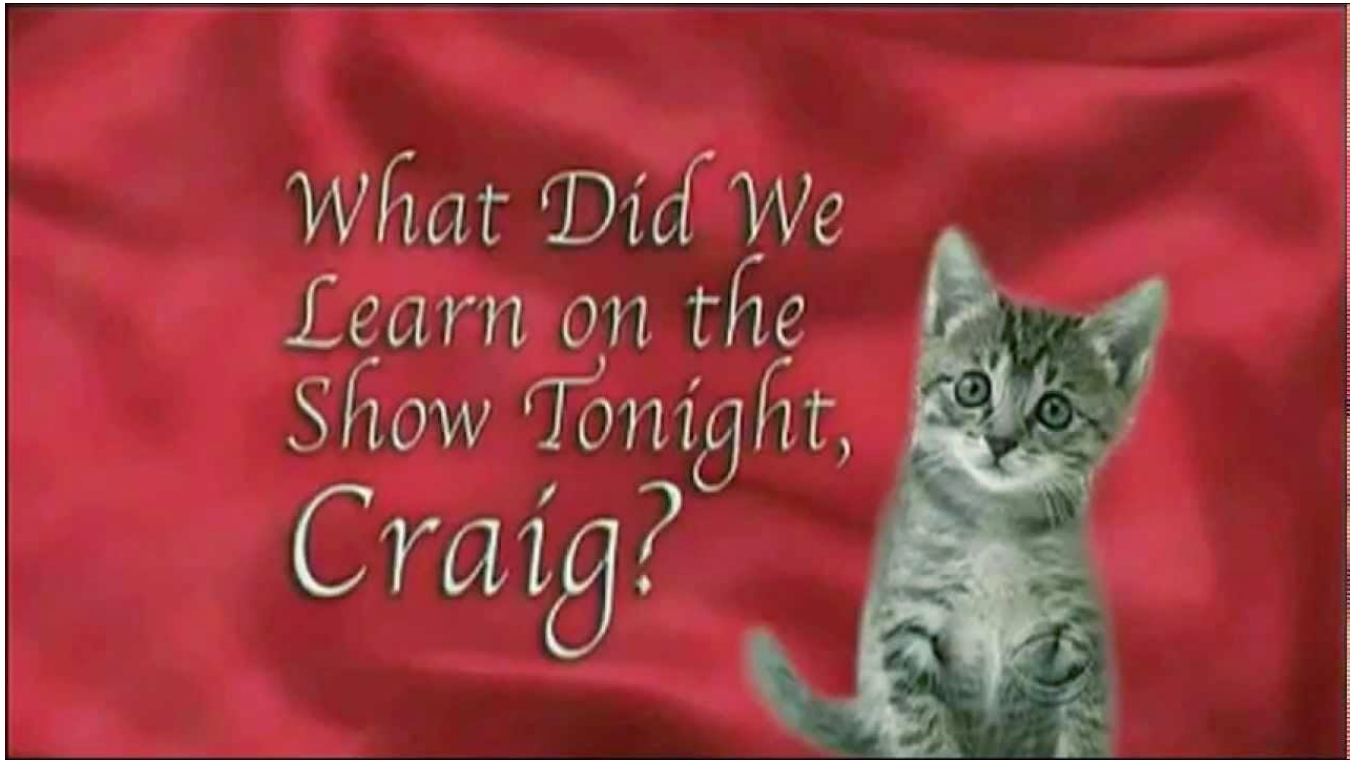
- Incluyan:
  - Pasos, Canales, Mapa emocional, Resultados de aprendizaje clave
- Tienen 15 minutos para completar el ejercicio
- Lo compartirán con la clase una vez esté terminado

Hora de mostrarnos sus journey maps

¿Voluntarios?



¿Qué aprendimos sobre Customer Journey Maps?

¿Qué aprendimos sobre Customer Journey Maps?

- Son representaciones visuales de la experiencia integral del consumidor
- Una secuencia de etapas y pasos, puntos de interacción y comunicación
- Pueden tener distintos niveles dentro de la experiencia end-to-end del cliente
- Útiles para realizar comparaciones “antes y después”
  - Esto remarca los verdaderos generadores de valor del producto y servicio
- Se deben hacer con el cliente en mente.

FIRST UBER RIDE EXPERIENCE

= ARTIFACT

JEN ASHBURN

32 years old

Full-time student with part-time job

Budget conscious

First time Uber user

GOALS

END: Use Uber App successfully, arrive at Lincoln Square Pancake House

EXPERIENCE: Stress-free experience getting to Lincoln Square Pancake House and avoiding parking/congestion, thrill of trying a new—potentially beneficial—experience

LIFE: Cost-consciousness, maximize offers; reliable, alternative means of transportation since she is a heavy commuter

DECISION TO USE

CHOOSE UBER

See promotion on internet for a FREE ride

Wanted to get food, but avoid the hassle of parking

DOWNLOAD APP

Find on the App Store

Download the app

NERVOUS

UBER APP PAGE IN APP STORE

SET UP ACCOUNT

REGISTER

Register new account

Choose outlet for creating account

Enter email and mobile number

Enter name

REGISTER SCREEN

CREATE ACCOUNT SCREEN

CREATE PROFILE SCREEN

ADD PAYMENT

Choose method for linking payment

Redirected to third party site

PAYMENT SCREEN

PAYPAL REDIRECTION

CAMERA (SCAN CARD)

VERIFY ACCOUNT

Choose verification method for mobile device's number

Alert for referral promo—choice to continue or skip (skip)

Receive verification code

Input verification code

VERIFICATION INTERFACE

TEXT MSG

REQUEST RIDE

SET UP RIDE

Choose to allow push notifications

Uber App does not list free ride

CONFUSED

Search for first ride promo

RELIEF

Input promo code "Feeling22" for a free ride up to $22

PUSH NOTIFICATIONS

GOOGLE

PROMO CODE SCREEN

REQUEST UBER

See wait time

Click "Set Pick-up Destination"

Input destination address

Request Uber

Option to scroll and pick driver

CURIOUS

Attempt to scroll and pick driver, but not moving

CONFUSED

GOOGLE MAP

DRIVER LIST

WAIT TIME COUNTER

GPS

RIDE UBER

FIND/ ENTER CAR

Phone call from driver asking for exact pick-up location

SURPRISED, RUSHED

See driver is in a Honda Accord on app

Walk outside to wait for ride

See "car" on GPS map arriving at location

See Lyft sticker on car, not Uber (through Uber sticker is on windshield)

Enter back seat of car

EXCITEMENT

Driver shifts items from front seat to make room

Verify destination to driver

Driver provides option to keep windows down or turn on AC, choose to keep windows down

PHONE CALL

DRIVER

CAR

GPS MAP LOCATION OF CAR

DRIVER'S PHOTO

CAR INFORMATION

LOGO ON CAR

TAKE RIDE

Ride route to restaurant

Conversate with driver

Dropped off at destination

NEW YORK ST.

WEST ST.

INDIANA AVE.

UNIVERSITY AVE.

7th St.

West Side Shoppes (Lincoln Square)

DRIVING ROUTE

ARRIVAL

COMPLETE TRANSACTION

Arrive at destination

SATISFIED

Transaction automatically complete

Leave cash tip for driver, unable to tip on app

HAPPY/GLAD, SATISFIED

Get receipt from app for transaction

HAPPY/GLAD

Alert to rate driver

RECEIPT OF TRANSACTION

RATE DRIVER

"I hope I can figure this out, and figure it out in a timely manner."

"This experience really puts the rider in control of a lot of decisions! This is great!"

"Love discounts! But that's time consuming and feels invasive to have it calling and texting friends/family when I don't know if they are okay with that."

"I could have sworn that the first ride is free. Hopefully that is still offered, otherwise, I am nervous that this is going to cost me more!"

"Yes! I'm happy I found a deal and it works!"

"Ok cool. I want to see what other drivers are out on, and pick one. I can see they have ratings, and I am has a 4.6. That is good."

"Why won't it scroll like it says you can?"

"Hmm! I didn't realize that I called the driver already. I thought I was supposed to select one. That was so quick! It said seven minutes when I last saw it, but that was only a minute or two."

"Wow! Wow!"

"That was a quick and painless drive. Didn't have to worry about parking or messing with the maps app as the phone to figure out how to get here."

"I want to give the $22 back! I can't because I don't have cash on me and they won't accept credit card. That is really inconvenient."

"Wow! It doesn't be a 4 minute ride seems like a lot much. Probably would choose to drive myself instead."

The initial appeal to download the app is not just to get where you want to go quickly and safely, but that the first ride is free. This element is crucial in the desire to download the app.

The app registration experience was quick and easy, the user simply input name, email, and phone number to register.

The experience of setting up the account is an empowering one. The user has a lot of control over the entire experience, including the payment method.

After registering and verifying the account, provide the steps of how to use features of the app within the app itself. People tend to use the app immediately after creating the account because the need is immediate. Displaying these steps will lead to ease of use and less uncertainty about features in the app.

Display a free ride promo code once Uber App has been downloaded and the user has registered. This will make it easier and more immediate for the rider to use the free ride and request an Uber.

The experience of requesting the Uber and choosing the driver puts the rider in control, which is an empowering experience compared to taking a taxi.

Include prompt within the app that allows the rider to include number of passengers when requesting Uber. The driver will then know how many he/she is transporting, and rider's won't feel intrusive by forcing the driver to move items around to make space for riders.

The Uber car was easy to identify because the app displayed the model of car that the driver would be driving. The driver also called as she was approaching the rom.

Make it more apparent that the Uber has been requested and a driver chosen. This will help riders make sure they are ready when the driver arrives.

The driver was friendly and talkative. The car itself was spacious and comfortable. The driver, Sue, was considerate in asking for our preference of windows up or down. She spoke positive things about drivers and rider security, which made us feel comfortable as riders.

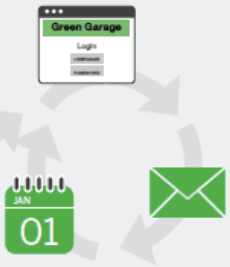
Add a feature in the Uber App that allows the rider to tip the driver, rather than putting the pressure on the rider to tip in cash. This makes it easier for riders to tip and raises the likelihood that the driver will receive a tip.

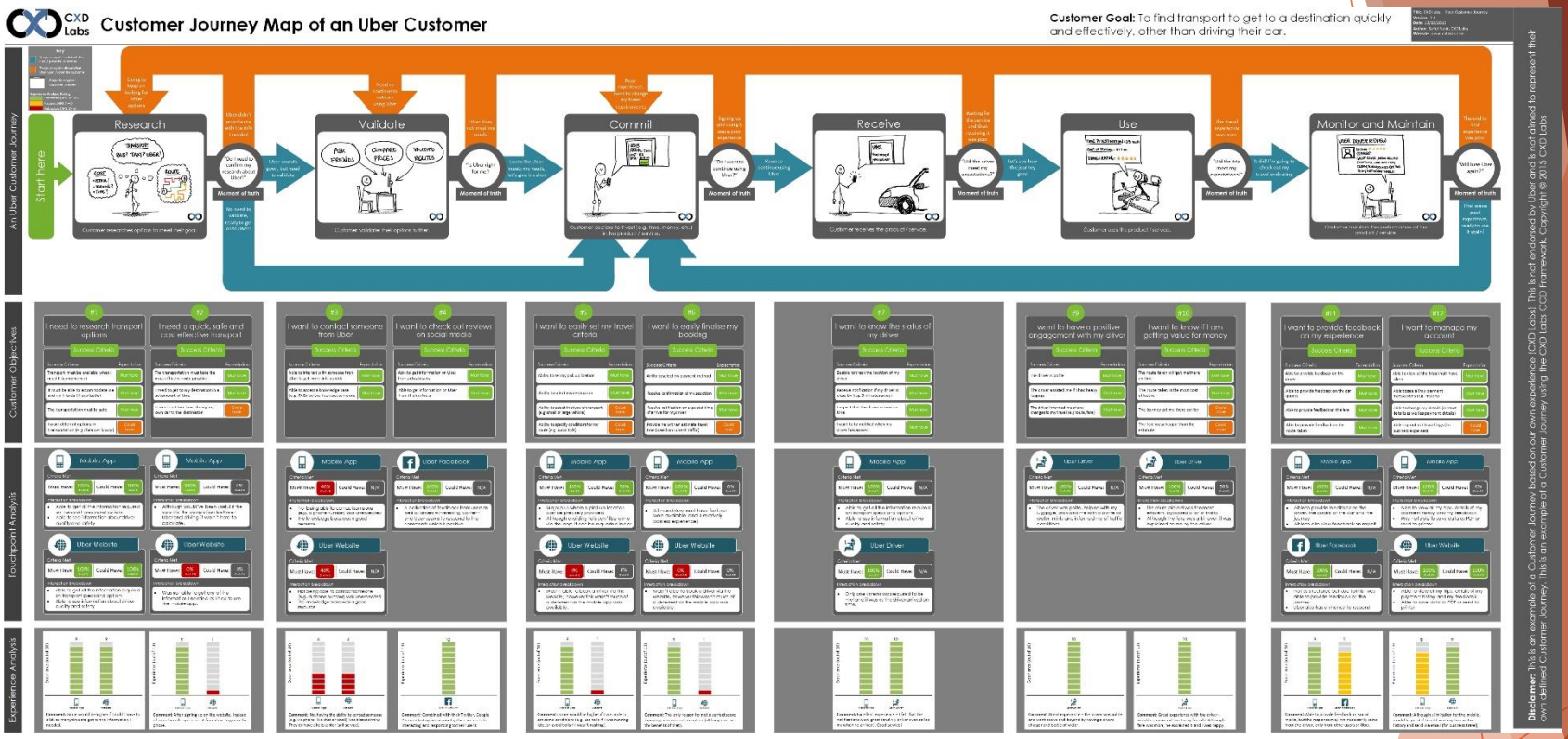
Allow for a running deduction off of the promo code within the app, since we did not use up all $22. This will make the code more worthwhile for the rider if they take multiple, shorter trips.

CRITICAL ANALYSIS FOR ACTION

Critical positive aspects of experience

Critical points for improvement

STAGES	RESEARCH	BOOK APPOINTMENT	ARRIVE AND CHECK IN	WAIT DURING SERVICING	CHECK OUT	FOLLOW-UP
DOING						
THINKING	• How much will this cost? • What's near me? • How can I contact them? • Why Green Garage?	• Are they flexible? Can I just show up? • What's the fastest way to book an appointment? • Can I cancel or reschedule? How?	• Is it easy to find and get there? • Where do I park? • Where do I go? Who do I talk to? • How long will the wait be? • How much will this cost?	• What can I do while I wait? • Would I rather wait here or come back later? • Will it be done on time? How will I know? • Can I watch what they are doing to my car? • How is my service eco-friendly?	• Will a mechanic tell me exactly did they did? • Will I understand what s/he is telling me? • What is the cost breakdown? • Are there other tips for maintaining my car?	• Where is my car? Is it in the same spot? • When will I need to bring my car in again? • What requires mechanic, and what can I do on my own?
FEELING	• Apprehensive - Don't want to spend a lot. • Annoyed - Car trouble is inconvenient. • Clueless - I'm clueless about cars. • Skeptical - Will this really help the planet?	• Frustrated - don't want to jump through so many hoops just to get an appointment. • Hopeful - I hope I get the time I want • Relieved - now that the appointment is set	• Anxious - If I'm late, will they still take me? • Uncertain - Am I in the right place? This looks different than other auto shops. • Annoyed - Car trouble is inconvenienced, but it has to get done.	• Surprised - It's spacious and comfortable. • Bored - No magazines/TV? But there's WiFi. • Skeptical - Is all this green stuff for real? • Impatient - how much longer will this take?	• Relieved - It's finally done! • Relieved - The cost is as expected. • Disappointed - Didn't meet my mechanic? • Clueless - Don't understand what they did.	• Hopeful - Will my car run better? • Optimistic - Does my car feel any different? • Cautious - Are they going to spam my inbox?
CUSTOMER EXPERIENCE	There's lots of competition so knowing who to trust is important. • Site is overwhelming and hard to navigate • Broken links • Outdated Info	Appointments can be booked by phone or online but it's tedious either way. • Online form asks for a lot of information • Large credit car image at the top is alarming • Online booking still requires email and phone. • Friendly attendant on the phone, but have to go through automated voice first.	Check-in is fast and friendly but it doesn't feel like the car is getting hugged. • No acknowledgement of first-time customer • Phone ringing constantly and loudly • Customer not informed that check-up is included with oil change, until he asked.	Waiting area is more comfy than most but reading product and green facts gets old fast. • Artifacts are not relevant to my service • No indication of my estimated completion • No entertainment • No acknowledgement from staff	Checkout is fast an painless but it doesn't inspire a huge desire to return. • Knowledge and passion only came after prompting. • No clear breakdown of what was done, how it saves money, or the planet • No reason to stay connected between visits	GG is on social networks but there's no reason to stay connected between visits. • Need better reminder than a sticker • Emailed receipt is a dead end. • Nothing to share or connect with my newly green-tuned car
OPPORTUNITIES	• De-clutter the website • Concise messaging • straight-forward navigation.	• Streamline appointment form and process • Customer profiles so repeat appointments are easier to set • Use phone for gathering additional details: –> Is valet required? –> What is going on with the car?	• Display signage for parking. • Identify if customer is new or returning (for rapport). • Acknowledge green thinking in conversation. • Provide a menu of services with prices. • Acknowledge both local amenities. Maps would be helpful.	• Provide status updates. • Simplify the display of the artifacts. • More staff interaction. It's good to hear from staff who are passionate about stainability. • Space is too open - differentiate between public and private spaces.	• Give highlights and direct them to their profile for more details about what was done • Empower customers to visit the site to increase their smilage. • Show price comparisons for different parts: GG vs. average auto shop.	• In the car service documentation, include diagrams and user-friendly terms. • Follow-up and build a relationship: how customer helped the environment with Green Garage, tips for the car, reminders, and invitations to special events. • Customer profile for long-term relationship, and record keeping, and easier appointments


CXD Labs
Customer Journey Map of an Uber Customer
Customer Goal: To find transport to get to a destination quickly and effectively, other than driving their car.
An Uber Customer Journey
Start Here
Research
Validate
Commit
Receive
Use
Monitor and Maintain
Moment of truth
Customer Objectives
Touchpoint Analysis
Experience Analysis
Mobile App
Uber Website
Uber Facebook
Uber Driver
Disclaimer: This is an example of a Customer Journey based on our own experience (CXD Labs). This is not endorsed by Uber and is not aimed to represent their own defined Customer Journey. This is an example of a Customer Journey using the CXD Labs CCD Framework. Copyright © 2015 CXD Labs

Tarea III

- Completar los customer journey maps relevantes para sus proyectos
  - Todos los niveles
  - Todas las Personas
  - Los rivales si les parece necesario resaltar alguna diferencia con respecto a los productos y servicios que ellos ofrecen.

Tareas

- Tienen 3 tareas:
  - Completar y refinar las Personas, modelo TES, y Journey maps que comenzaron hoy
- Ver el material del Flipped Classroom 7
- Preparar el análisis competitivo de sus proyectos para presentarlo en la próxima clase.

¡Gracias por su atención!

No olviden las tareas y nos vemos la próxima clase.