

Previously on E&I...

Opportunity creation.

A quick recap of Class 5

- ▶ Product and customer development
 - ▶ Complementary approaches to value generation.
- ▶ Competing is the process of finding a competitive advantage.
- ▶ Competitive models, sophisticated or intuitive
 - ▶ Based on an innovation
 - ▶ Based on the business model
 - ▶ Ideally intertwined.

What went on in the last weeks?

▶ ~~Partial Exam~~

▶ ~~First presentation: August 27~~

▶ What you currently have:

▶ Problem

▶ Solution

▶ Customer profile(s)

▶ Some evidence from secondary sources

▶ The challenge of learning how social/sustainable entrepreneurship works.

What comes next?

- ▶ Second presentation: October 22
- ▶ A lot of groundwork
 - ▶ Developing a prototype
 - ▶ Getting out there to talk to people
 - ▶ Update and refine your prototype
 - ▶ Go deep into the industry/sector/market/segment
 - ▶ Market Research (demand estimation and marketing plan)
 - ▶ Primary Research (resources, funding)
- ▶ In a nutshell: to go from an abstract idea to a value proposition customers are attracted to, a plan for you to make the idea a reality, and concrete indicators for investors.

Homework time!

- ▶ You must have watched the material for
 - ▶ Flipped Classroom 5
 - ▶ Flipped Classroom 6
- ▶ Present the updated versions of your projects
 - ▶ Five minutes to share with us what you learned about social and sustainable entrepreneurship and innovation
 - ▶ How you apply it to your work
 - ▶ The team members who were missing must talk!

ENTREPRENEURSHIP AND INNOVATION

Class 8 - Customer Research: Personas and Journey
maps

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Pontificia Universidad Javeriana in Bogotá, Fall 2018

Personas

Who are we working for?

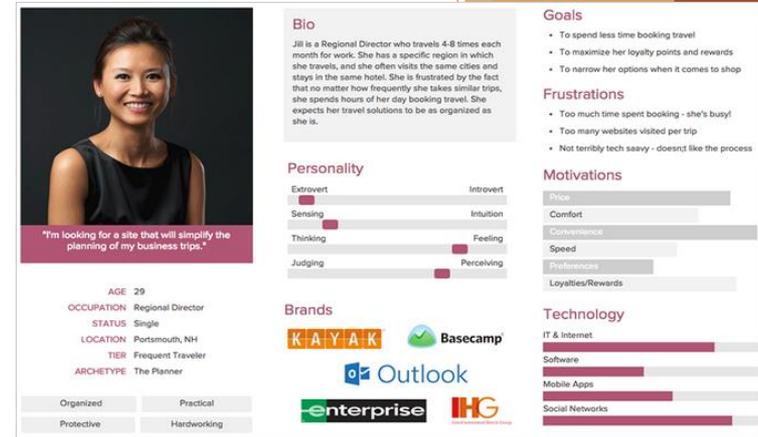
What is a Persona?

- ▶ An abstract representation of
 - ▶ A type of customer or user
 - ▶ Groups of people with similar needs
 - ▶ Market segments
 - ▶ Stakeholders

- ▶ A profile of who we are designing/working for

- ▶ They include rich, relevant characteristics
 - ▶ Not only demographic data

- ▶ They evolve over time



What is a 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

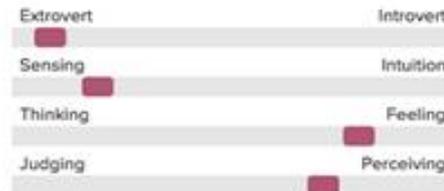
Protective

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



Brands



Goals

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

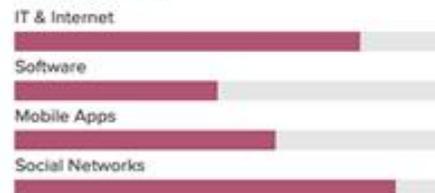
Frustrations

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

Motivations



Technology





STEVE, 47

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.

PERSONA PROFILE

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.

What he wants to know

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

Why he buys from us?

Price and Expertise

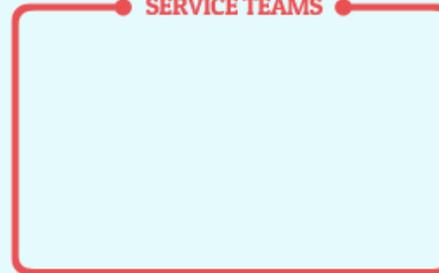
Pain points

- 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 doesn't want

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

SERVICE TEAMS



Let's create your Personas

- ▶ You will receive a template



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 (+)

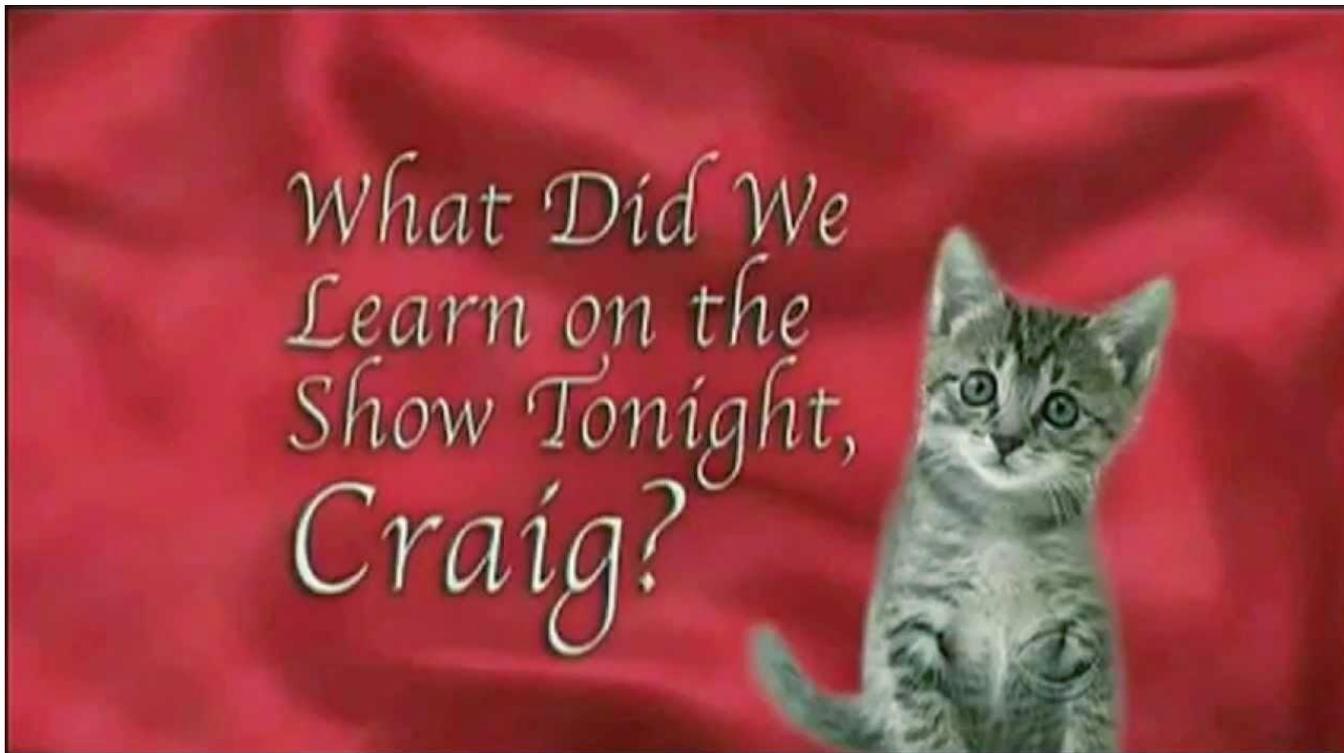
NOT WANTS (-)

Let's create your Personas

- ▶ You will receive a template
- ▶ In your teams, prepare as many as you need for your project
- ▶ You have 10 minutes to complete them
 - ▶ Be as serious, realistic, and thorough as you can!
- ▶ You will present your Personas to the class.

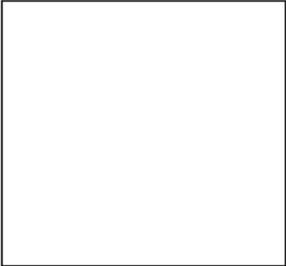
Time to show us those Personas

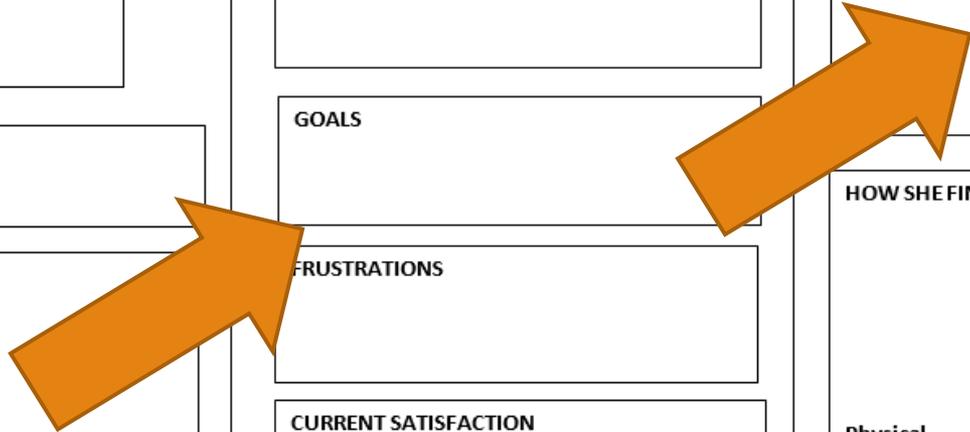
Volunteers?



What did we learn about
Personas?



	<p>HOW SHE SOLVES THE PROBLEM TODAY</p>	<p>ROLE</p>						
<p>NAME</p>	<p>GOALS</p>	<p>REASONS FOR BUYING/USING</p>						
<p>DEMOGRAPHICS</p>	<p>FRUSTRATIONS</p>	<p>HOW SHE FIND US</p> <table border="1"> <tr> <td data-bbox="1236 492 1449 785">Physical</td> <td data-bbox="1449 492 1671 785">Info</td> </tr> </table>	Physical	Info				
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<p>PERSONALITY</p>	<p>CURRENT SATISFACTION</p> <table border="1"> <tr> <td data-bbox="685 778 763 806">LOW</td> <td data-bbox="782 778 898 806">MEDIUM</td> <td data-bbox="917 778 994 806">HIGH</td> <td data-bbox="1014 778 1149 806">VERY HIGH</td> </tr> </table> <p>HOW SHE FINDS THEM</p> <table border="1"> <tr> <td data-bbox="685 821 917 1063">Physical</td> <td data-bbox="917 821 1139 1063">Info</td> </tr> </table>	LOW	MEDIUM	HIGH	VERY HIGH	Physical	Info	<p>CHALLENGES USING</p>
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LOW	MEDIUM	HIGH	VERY HIGH					
<p>WHY?</p>		<p>NOT WANTS (-)</p>						



Why do we want to create Personas?

- ▶ Fictional but a good tool to **understand the customers**
- ▶ Help us comprehend the needs and wants of the users, frustrations and (hidden) **sources of value**
- ▶ Designers can use them to **test assumptions**
- ▶ Should be **created using data** collected from the real world
- ▶ Focus, sharpen or redefine elements of our business :
LEARN!

Homework I

- ▶ In your teams **refine and complete your project's Personas**
- ▶ Use as much real data as you can
 - ▶ Include all types of relevant customers/users.
- ▶ Do not talk to the potential customers just yet but really have them in mind.
 - ▶ Prepare a list of 3 subjects per each persona (Real!!!)
- ▶ Submit them next class (Monday 10)
 - ▶ Conduct informal approaches and/or interview them.

Competitive Outlook

Where do we stand and who do we measure up against?

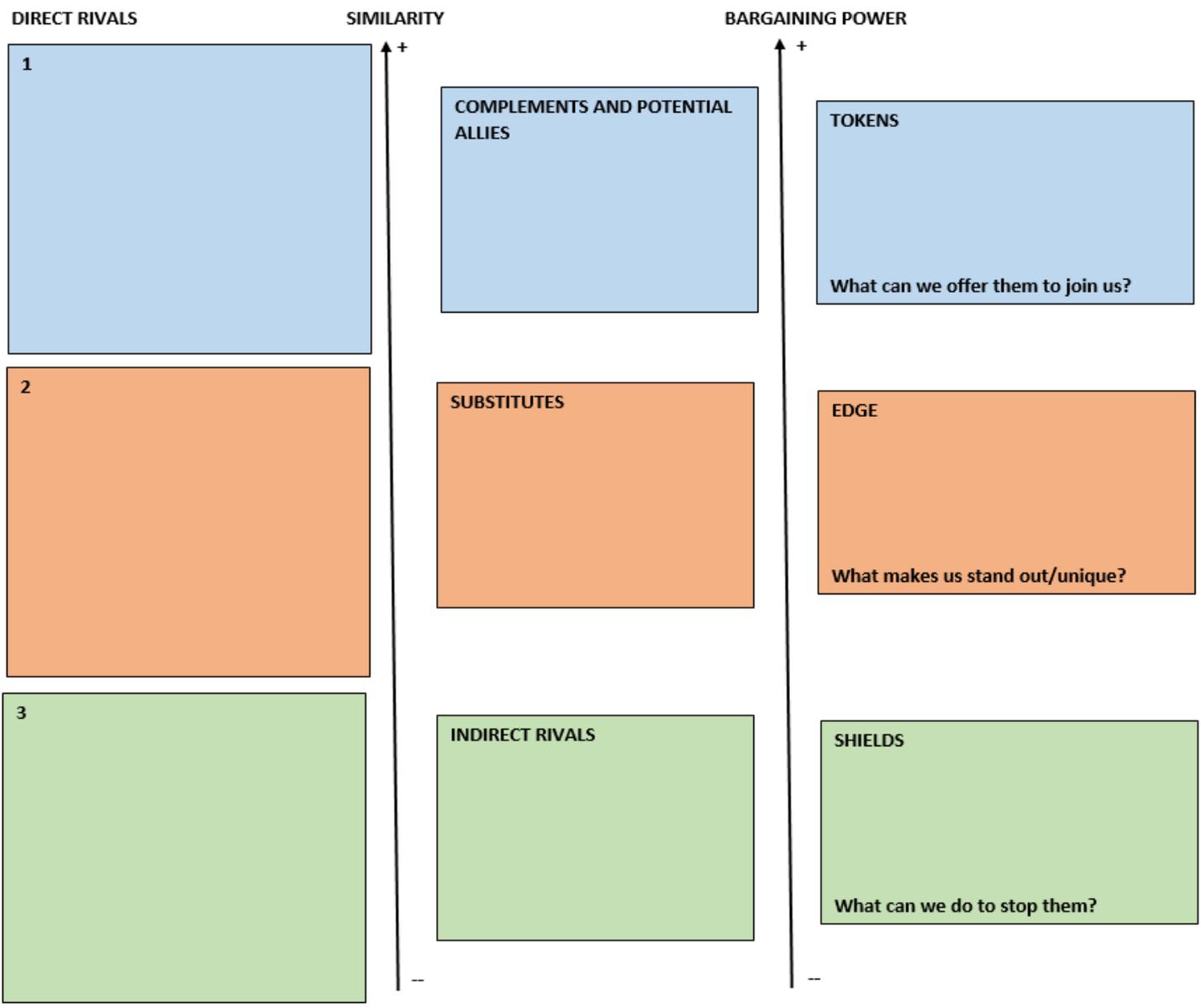
What is a Competitive Outlook?

- ▶ The first approximation of the segment/market/sector/industry you will enter
- ▶ A broad identikit of your main competitors, allies, etc.
- ▶ You create it using secondary data

Let's map your Competitive Outlook

- ▶ There is no recipe but you will receive a template that might be useful

THE IDEA TODAY

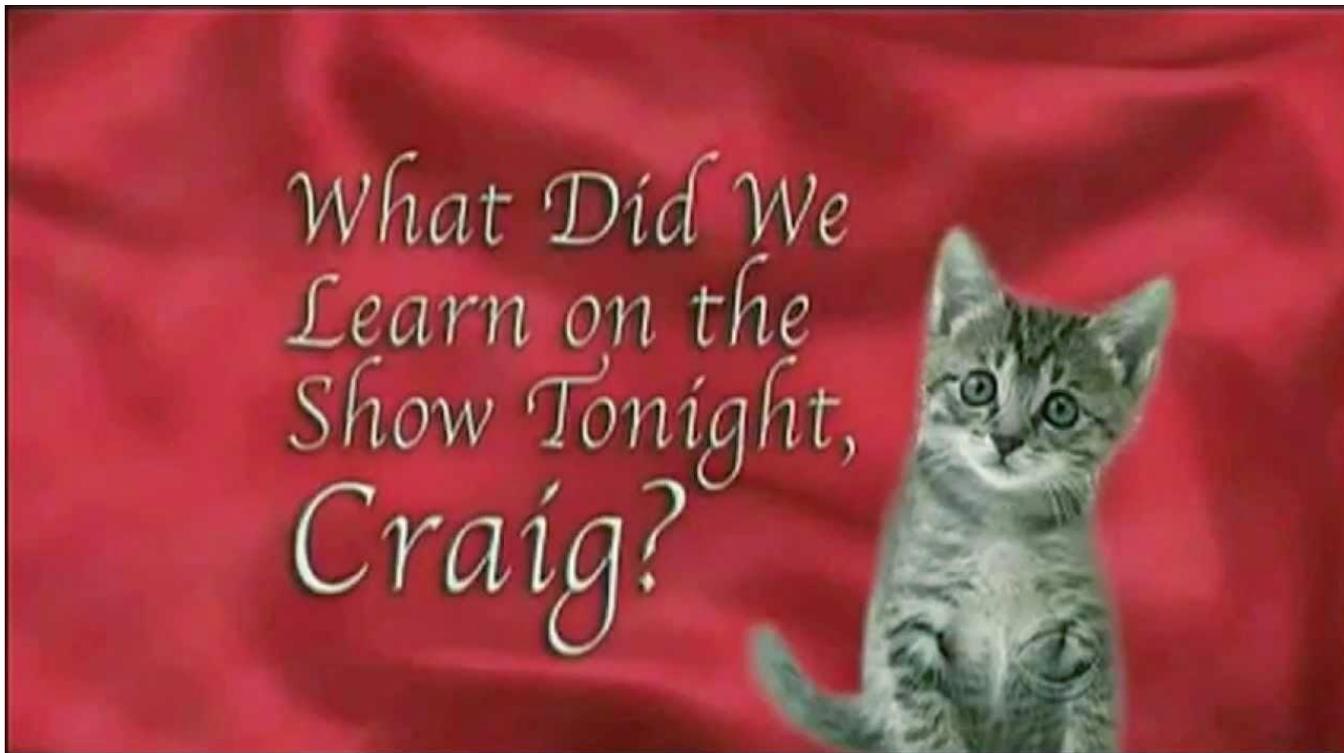


Let's map your Competitive Outlook

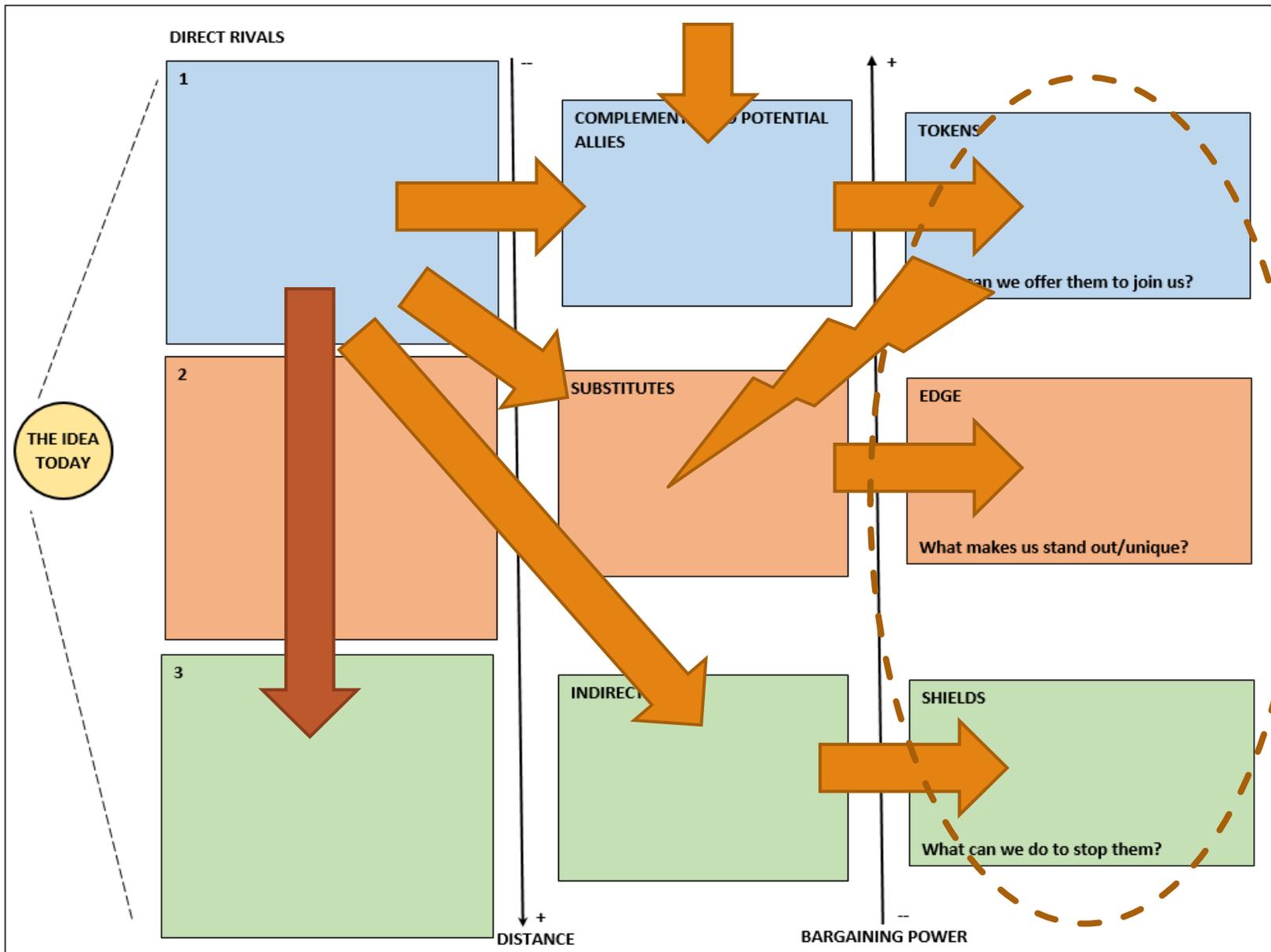
- ▶ There is no recipe but you will receive a template that might be useful
- ▶ Complete the template in your teams
- ▶ Reflect about your project and use sourced data if necessary
- ▶ You have 10 minutes to complete the template
- ▶ You will then present it to the class

Time to tell us about your competitors

Volunteers?



What did we learn about our
Competitive Outlook?

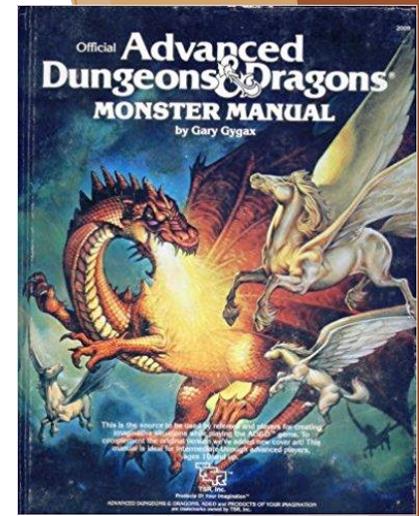


Why is it useful to conduct this analysis?

- ▶ This is just a snapshot but the reality is hardly static
- ▶ The next step is to pick and focus on some of them
 - ▶ Then find as much as you can about them
 - ▶ Primary sources are reasonable in that stage
 - ▶ Apply some of the techniques you already have used.
- ▶ It is not enough to know the names of our “rivals”
- ▶ The important part is **what you do about them!**
 - ▶ I just gave you a shortcut!

The TES Model

- ▶ **TES : Tokens, Edge, Shields**
 - ▶ **Tokens:** What you can offer to close competitors to turn them into allies.
 - ▶ **Edge:** What are the core value-generating attributes of your service.
 - ▶ **Shields:** What barriers are in place and how you can preserve them as an incumbent.
- ▶ The value-generating attributes will feed into your Value Proposition
 - ▶ These attributes are defined by the customers!



Flipped Classroom 7

- ▶ Some videos on how to conduct competitive research
- ▶ Many tools and techniques you may already be familiar with (or know others)

Homework II

- ▶ In your teams, complete the TES Model form
- ▶ Watch the Flipped Classroom 7 videos
- ▶ You will present the results of your competitive analysis next class
 - ▶ Not just the names of the rivals: what you do!
 - ▶ Submit the tools (Including the TES form) in a written document.

Customer Journey Maps

What are they useful for?

What is a Customer Journey Map?

- ▶ A visual tool which **connects** several aspects of the **customer experience**
 - ▶ Their goals,
 - ▶ Interactions and communications with us,
 - ▶ Channels,
 - ▶ Emotional reactions,
 - ▶ Etc.



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	Shopping cart, smartphone, laptop	Website, app, order confirmation email	Delivery service, packing, messages (email, SMS, phone)	Phone, email, chat	Food products, packages, other materials	Shopping cart, smartphone, envelope, phone	Word of mouth, social media
EXPERIENCE	3	3	4	3	4	1	4	3	4
	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 coefficient, 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

What is a Customer Journey Map?

- ▶ A visual tool which **connects** several aspects of the **customer experience**
 - ▶ Their goals,
 - ▶ Interactions and communications with us,
 - ▶ Channels,
 - ▶ Emotional reactions,
 - ▶ Etc.
- ▶ It is an outline, a map, a model
- ▶ They are simple but can have several levels or stages
- ▶ Should be backed by data and research
- ▶ They must be **useful**, not ideal!

Let's build your own Customer Journey Maps

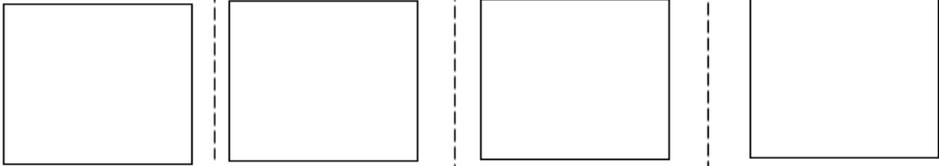
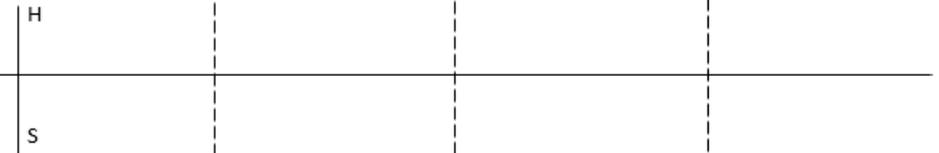
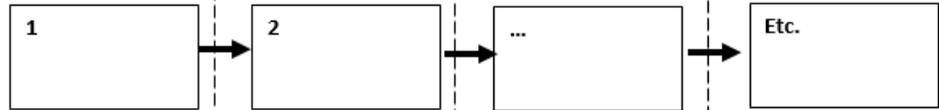
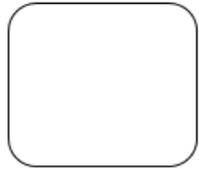
- ▶ You will receive a large sheet of paper and some markers
- ▶ In your teams prepare the journey map for one of your personas
- ▶ Choose only one persona and a stage of the journey (if you have many)
- ▶ Include:
 - ▶ Steps, Channels, Emotional Chart, Key Learning Outcomes
- ▶ You have 15 minutes to complete the exercise
- ▶ You will share it with the class afterwards



PROCESS

PERSONA

- Storyboard
- Channels
- Touch points
- Deliverables
- Steps
- Emotional chart
- Experience of reactions
- Key learning outcomes

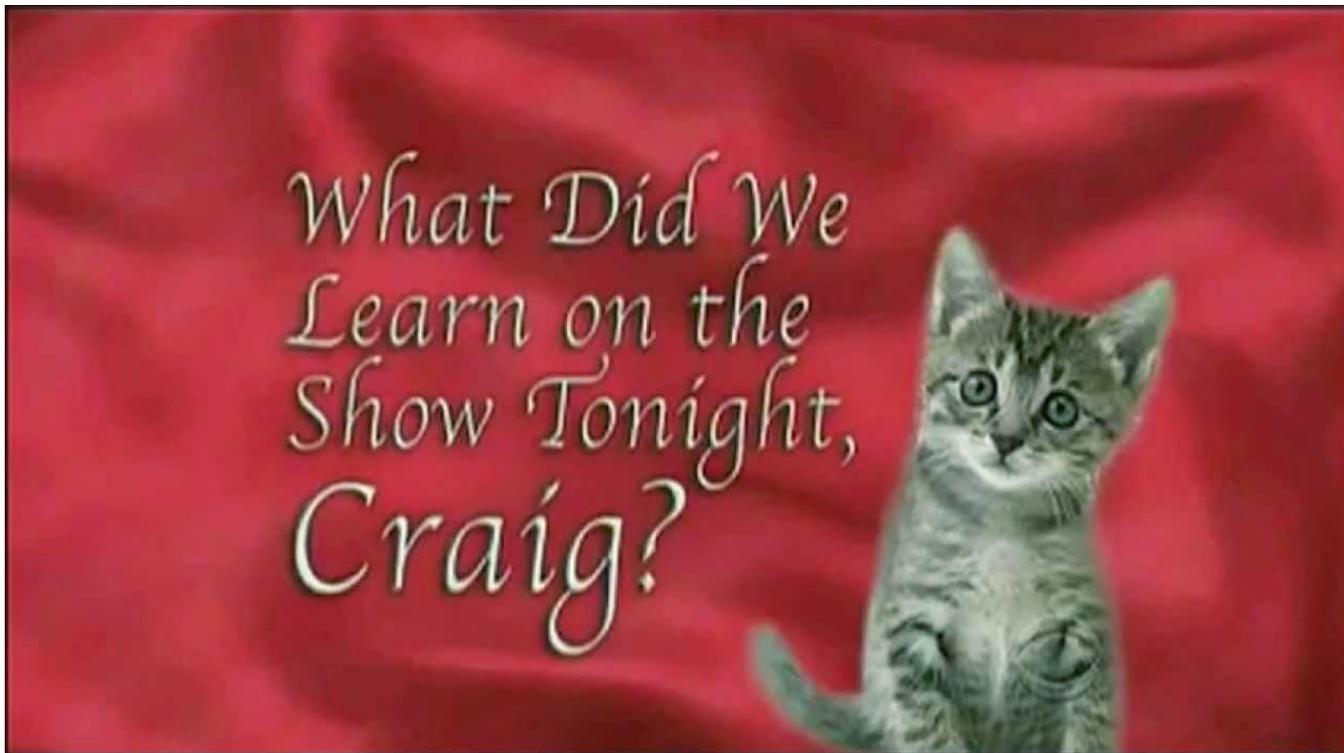


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Time to show us those journey maps

Volunteers?



What did we learn about
Customer Journey Maps?

What did we learn about Customer Journey Maps?

- ▶ Visual representations that illustrate the overall customer experience
- ▶ A sequence of stages and steps, interaction and communication points
- ▶ They can have different levels of scope inside the end-to-end customer experience
- ▶ Useful to do for “before and after” scenarios
 - ▶ This highlights the real value of the product or service
- ▶ Should be done with the customer in mind.



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, minimize delays, reliable, alternative means of transportation since she is a heavy commuter.

FIRST UBER RIDE EXPERIENCE



DECISION TO USE

CHOOSE UBER

See promotion on internet for a \$200 ride.
Wanted to get back, but avoid the hassle of parking.

DOWNLOAD APP

Find on the App Store.
Download the app.
NEWLINE



SET UP ACCOUNT

REGISTER

Register new account.
Choose method for creating account.
Enter what and mobile number.
Enter name.



ADD PAYMENT

Choose method for making payment.
Redirected to third-party site.



VERIFY ACCOUNT

Choose verification method.
No mobile device's number.
Ask for delivery person—check to confirm on app (SMS).
Receive verification code.
Input verification code.



REQUEST RIDE

SET UP RIDE

Choose to allow push notifications.
Other app does not let her see this.
CONFUSED
Search for first ride promo.
DECEASED
Input promo code "Testing02" for a free ride up to \$22.



REQUEST UBER

Set wait time.
Click "Get Pick-up Destination".
Input destination address.
Request Uber.
Option to send and pick driver.
CONFUSED
Attempt to scroll and pick driver, but not moving.
CONFUSED



RIDE UBER

FIND/ENTER CAR

Phone call from driver asking for exact pick-up location.
CONFUSED
See driver is in a Honda Accord in app.
Both vehicles too close to ride.
See "car" in GPS map pending of location.
See light sticker on car, not Uber (though Uber driver is an asshole).
Enter back seat of car.
EXCITED!



TAKE RIDE

Ride made to restaurant.
Conversate with driver.
Drop-off at destination.



ARRIVAL

COMPLETE TRANSACTION

Arrive at destination.
EXCITED!
Transaction automatically complete.
Cancel call to get driver, unable to tip in app.
Get receipt from app for transaction.
EXCITED!
Meet with driver.



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

The app registration experience was slick 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 the 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 prompts within the app that allow the rider to include number of passengers when requesting Uber. The driver will then know how many people is transporting, and riders won't feel intrusive by forcing the driver to move them 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 in the way approaching corner. 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 subjective. The car itself was spacious and comfortable. The driver, too, was considerate in asking for our preference of whether to sit in front, the space position thing about driver 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 takes the likelihood that the driver will receive a tip. Allow for a rounding 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.

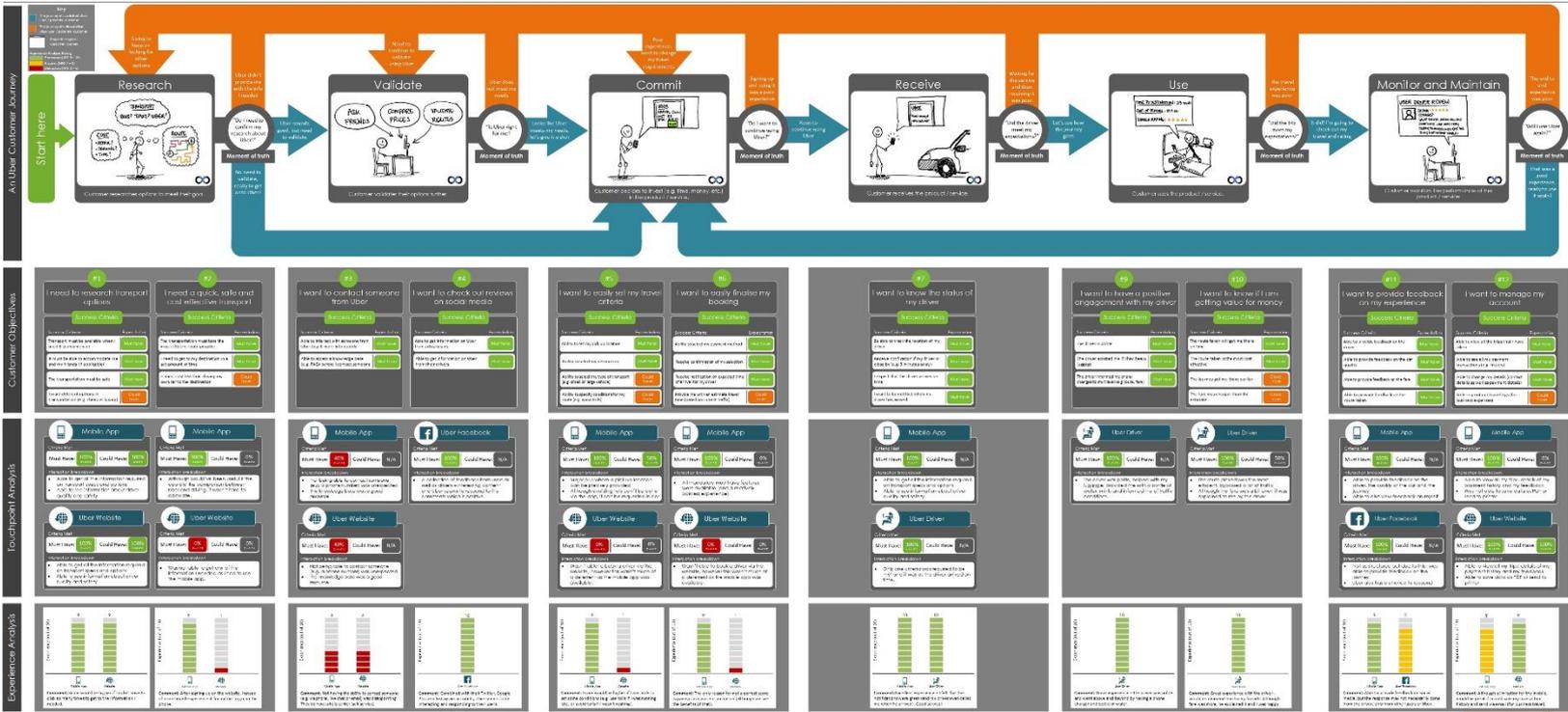
CRITICAL ANALYSIS FOR ACTION

- 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	<ul style="list-style-type: none"> • How much will this cost? • What's near me? • How can I contact them? • Why Green Garage? 	<ul style="list-style-type: none"> • Are they flexible? Can I just show up? • What's the fastest way to book an appointment? • Can I cancel or reschedule? How? 	<ul style="list-style-type: none"> • 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? 	<ul style="list-style-type: none"> • 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? 	<ul style="list-style-type: none"> • 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? 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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? 	<ul style="list-style-type: none"> • Frustrated - don't want to jump through so many hoops just to get an appointment. • Hopeful - I hope I got the time I want • Relieved - now that the appointment is set 	<ul style="list-style-type: none"> • 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 inconvenient, but it has to get done. 	<ul style="list-style-type: none"> • 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? 	<ul style="list-style-type: none"> • Relieved - It's finally done! • Relieved - The cost is as expected. • Disappointed - Didn't meet my mechanic? • Clueless - Don't understand what they did. 	<ul style="list-style-type: none"> • Hopeful - Will my car run better? • Optimistic - Does my car feel any different? • Cautious - Are they going to spam my inbox?
CUSTOMER EXPERIENCE	<p>There's lots of competition so knowing who trust is important.</p> <ul style="list-style-type: none"> • Site is overwhelming and hard to navigate • Broken links • Outdated info 	<p>Appointments can be booked by phone or online but it's tedious either way.</p> <ul style="list-style-type: none"> • Online form asks for a lot of information • Large credit card 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. 	<p>Check-in is fast and friendly but it doesn't feel like the car is getting hugged.</p> <ul style="list-style-type: none"> • 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. 	<p>Waiting area is more comfy than most but reading product and green facts gets old fast.</p> <ul style="list-style-type: none"> • Artifacts are not relevant to my service • No indication of my estimated completion • No entertainment • No acknowledgement from staff 	<p>Checkout is fast and painless but it doesn't inspire a huge desire to return.</p> <ul style="list-style-type: none"> • 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 	<p>GG is on social networks but there's no reason to stay connected between visits.</p> <ul style="list-style-type: none"> • Need better reminder than a sticker • Emailed receipt is a dead end. • Nothing to share or connect with my newly green-tuned car
OPPORTUNITIES	<ul style="list-style-type: none"> • De-clutter the website • Concise messaging • straight-forward navigation. 	<ul style="list-style-type: none"> • Streamline appointment form and process • Customer profiles so repeat appointments are easier to set • Use phone for gathering additional details: -> is visit required? -> What is going on with the car? 	<ul style="list-style-type: none"> • Display signage for parking. • Identify if customer is new or returning (for support). • Acknowledge green thinking in conversation. • Provide a menu of services with prices. • Acknowledge both local amenities. Maps would be helpful. 	<ul style="list-style-type: none"> • Provide status updates. • Simplify the display of the artifacts. • More staff interaction. It's good to hear from staff who are passionate about sustainability. • Space is too open - differentiate between public and private spaces. 	<ul style="list-style-type: none"> • Give highlights and direct them to their profile for more details about what was done • Empower customers to visit the site to increase their smile. • Show price comparisons for different parts: GG vs. average auto shop. 	<ul style="list-style-type: none"> • 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.



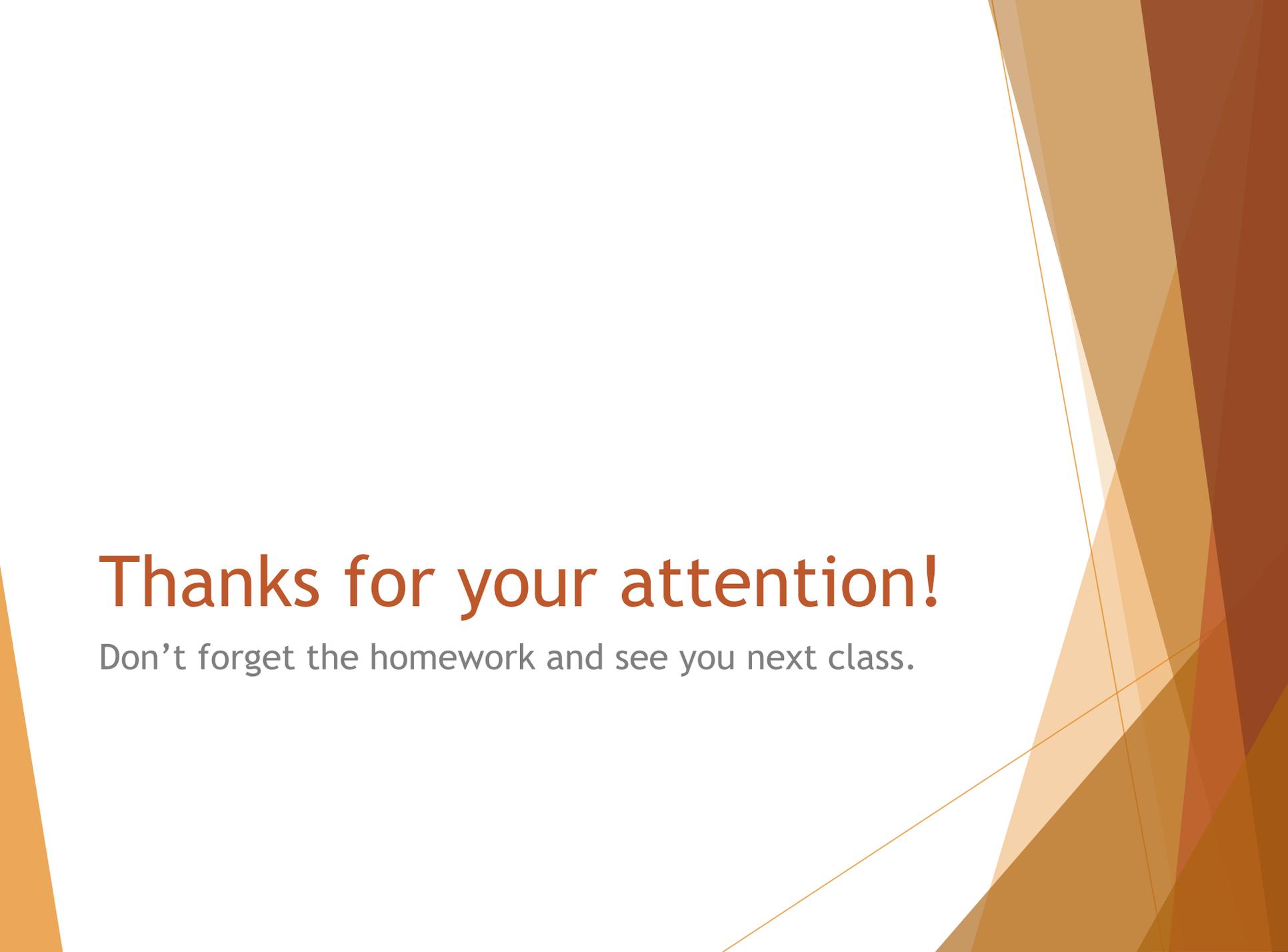
Disclaimer: This is an example of a Customer Journey Map based on our own experience at CXD Labs. This tool, endorsed by Uber and not created to represent their own business Customer Journey, this is an example of a Customer Journey using the CXD Labs CXD framework. Copyright © 2015 CXD Labs

Homework III

- ▶ Complete the relevant customer journey maps for your ideas
 - ▶ All the scope levels
 - ▶ All the Personas
 - ▶ The rivals if you find it necessary to highlight the value of your product or service

Homeworks (ALL)

- ▶ You have 4 of them:
 - ▶ Complete and refine the Personas, TES models, and Journey maps you have started here today
- ▶ Watch the material for Flipped Classroom 7
- ▶ Prepare your project's competitive analysis to present it next class.
- ▶ Run interviews with the potential customers/experts (get the list approved before, by Monday 10)
- ▶ Next class (Monday 17) you will have 10 minutes to share your progress and explain the results of these homeworks.



Thanks for your attention!

Don't forget the homework and see you next class.