Scenario: Sarah, a Senior Real Estate Analyst at ABC Company, needs to analyze housing market trends to provide data-driven pricing recommendations to leadership. She currently struggles with fragmented data across multiple spreadsheets and lacks visual insights to guide strategic decisions.

Entice How does someone become aware of this service?

Enter What do people experience as

they begin the process?

Engage In the core moments in the process, what happens?

Exit What do people typically experience as the process finishes?

Extend What happens after the experience is over?

Experience steps

What does the person (or people) at the center of this scenario typically experience in each step?

Discovery Phase

- Hears about new visualization platform from IT team
- Sees demo presentation in team meeting
 - Reviews project proposal document

Initial Access

- Receives login credentials
- First-time platform access
- Explores role-based analyst dashboard
- Reviews getting started guide

Daily Usage

- Logs into the dashboard daily
- Applies filters for specific analysis. Creates custom views
- Drills down into property details
- Exports visualizations for reports

Report Generation

- Finalizes analysis findings
- Exports charts and data
- Creates a presentation for leadership
 - Submits recommen

Continuous Improvement

- Provides platform feedback
- Requests additional features

Mentors new team members

- Advocates for expanded
- usage

step along the way?

- People: Who do they see or talk to? Places: Where are they?
- Things: What digital touchpoints or physical objects do they use?

People: IT team lead, Project manager Places: Conference room, Office

Things: Project proposal, Demo presentation, Email notifications

People: System administrator, Help desk Places: Office workstation Things: Login portal, Tutorial videos, User guide PDF

People: Marketing team, Fellow analysts, Data sources Places: Office, Home office, Meeting rooms Things: Tableau dashboard, Filter panels, Export tools

People: Company executives, Leadership team Places: Boardroom, Executive

offices Things: PowerPoint slides, PDF reports and printed charts

People: New team members, Development team, Stakeholders Places: Training rooms, Virtual meetings

Things: Feedback forms, Feature requests, Success metrics

Goals & motivations At each step, what is a person's primary goal or motivation? ("Help me..." or "Help me avoid...")

Help me understand

if this tool can solve my data visualization challenges and reduce manual analysis time

Help me get started

quickly without extensive training and see immediate value from the platform

Help me analyze

housing trends efficiently and create compelling visualizations for stakeholders

Help me deliver

confident, data-driven recommendations that impact business decisions

Help me become

more strategic in my role and establish expertise in market analysis

Positive moments What steps does a typical person find enjoyable, productive, fun, motivating, delightful, or exciting?

addresses specific pain points

- Motivating ROI projections (90% time savings)
- Delightful seeing interactive demo
- Exciting to see a solution that
 Productive immediate access to clean, organized data Fun exploring interactive
 - visualizations
 - Enjoyable intuitive navigation design
- Exciting discovering patterns in data quickly
- Motivability to drill down for detailed insights
 - Productive real-time filtering capabilities

•Delightful professionallooking exported charts

- Productive streamlined report creation
- Exciting positive leadership feedback

 Motivating recognition for improved analysis quality

- Mentoring others on platform usage
- Exciting expanded responsibilities

Negative moments What steps does a typical person find frustrating, confusing, angering, costly,

- Frustrating skepticism about another "solution"
- •Time-consuming attending multiple demo sessions
- Confusing technical jargon in presentations
- Angering initial login difficulties Confusing learning a new
- interface layout •Frustrating missing familiar Excel shortcuts
- Exciting discovering patterns in data quickly-Motivatingability to drill down for detailed insights.Productivereal-time filtering capabilities
- Frustrating export formatting limitations
- Time-consuming manual Adjustments for presentations
- Angeringoccasional system downtime
- Frustrating slow response to feature requests Time-consuming training
- new users repeatedly Confusing version updates

changing interface