

# Customer Journey & Problem Prioritization : Online Investment Platform

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# Table of Contents

- Case
- Customer Journey Map
- Eisenhower Matrix





# Case

The objective of this case study is for you to conduct research and talk to potential customers to find out and solve their pain points as a Product Manager of a tech company. Conducting proper user research is an important skill for any product manager to have deliver great values to the customer.

Imagine that you are working as a Product Manager in a **new startup with the product of an online investment platform**. There are few players in the market already, locally and globally, such as Bibit, Ajaib, Pluang, Robinhood, Seedrs, etc.

There are a few task that you need to do:






1. Since the product is relatively new, please create a **Customer Journey Map** of the online investment industry. You can do your own research by referring to the journey of the existing player.
2. List out any problem or pain point that you find out during your benchmark to the existing platforms. Prioritize the problems so that your team can do the most urgent one first. You may use the **Eisenhower Matrix** prioritization method that you learned during the mini course to answer this question.







# Customer Journey Map

Phase of Journey	Registration	Onboarding	Search & Compare Products	Buy Products	Manage Portfolio
Actions What does the customer do?	Connect their Google account Register using Email Data Verification	Goes through product onboarding Clicks on help icon Fills in Risk Profile Question	Open Product List Filter based on Type See trend Graph Download Fund Fact Sheet	Input Amount to buy Enter Promo Code Make Payments	Check Gain/Loss Check Total Assets Check Asset Class Allocation
Touchpoint What part of the service do they interact with?	Register Page Email KYC Page	Product Onboarding Steps FAQ Page Risk Profile Page	All Products Tab Search & Filter options Each Product Detail Page	Buy Now Checkout Page Choose Payment Page Order History Page	Dashboard Detail Information Note
Customer Thought What is the customer thinking?	Minimal Registration steps This is easy, I can sign up with Google account I only need fill which is make sense, Steps are easy	Why are there so many Pop-ups? Where do I start? Educational materials are easy to follow Long Question	Limited product selection hard to search Graph & Previous trends all good Download sometimes failed, I need to refresh couple times	easy buying process I get lots of promos Many choices of payment methods There is no feature to download order history	Easy to check my gain/loss Easy to check my total assets Easy to check Asset Class Allocation
Customer Feeling What is the customer feeling?	😊	😞	😞	😊	😊
Process ownership Who is in the lead on this?					
Opportunities	Enable Register with Phone Number Give the user extra credits to spend on premium templates	Make the onboarding shorter Suggest products based on risk profile straight away Review the popups Review Risk Profile Questions	Add more Products enable search by Product Name enable filter by AUM Fix Download Issue		

miro

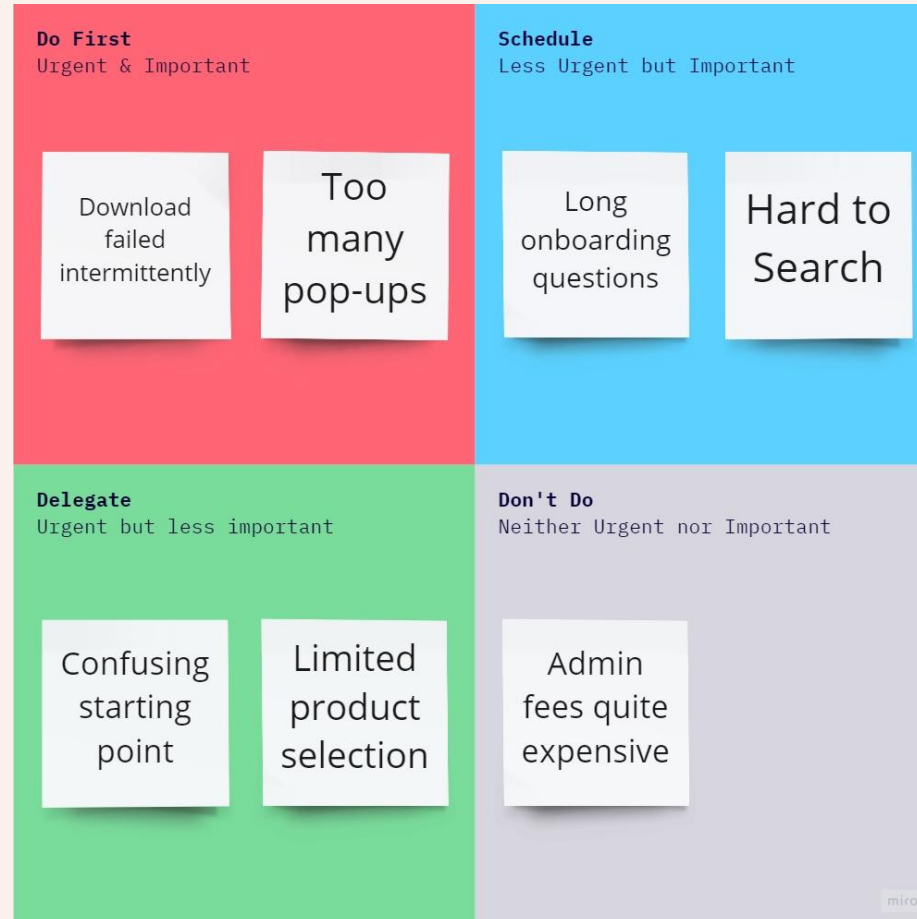
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# Eisenhower Matrix



THANK YOU