Personal Expense Tracker Application
Customer Journey Map

Customer experience journey map

Use this framework to better understand customer needs, motivations, and obstacles by illustrating a key scenario or process from start to finish. When possible, use this map to document and summarize interviews and observations with real people rather than relying on your hunches or assumptions.

Created in partnership with
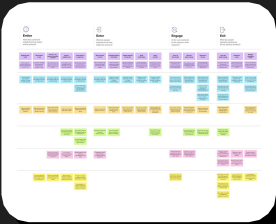
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Document an existing experience

Narrow your focus to a specific scenario or process within an existing product or service. In the **Steps** row, document the step-by-step process someone typically experiences, then add detail to each of the other rows.

TIP
As you add steps to the experience, move each these "Five Es" to the left or right depending on the scenario you are documenting.

	Entice How does someone initially become aware of this process?	**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?
SCENARIO Browsing, booking, attending, and rating a local city tour					
Steps What does the person (or group) typically experience?	Customer Onboarding; Understanding user plan; Balance info / Enter personal details; Choose personal/business plan; Enter initial account balance	Record expense; Update data; Monthly recurring bills / Record the first expense; Update salary/account balance/monthly limit; Monthly recurring bills can be added for automatic reduction of amount	Success stories; Closeness to rewards; Interactive graphs for analysis; User expense report / Show any past success stories; Show how close the user is to reaching his goal; Display interactive graphical analysis of expenses for the current/prev month; Generate a report that includes all expenses of the past month along with spine analysis	Month-end report; User Review; Month-end reward / Detailed month-end expenses report generated; Pop-up requesting user to rate the step; Remaining unused balance added along with the limit added to saved points	User feedback; Share App; Share rewards earned via email / User enters what features he expects and is not satisfied with in this app; User shares this app with their friends; User chooses whom to share the achievement with
Interactions What interactions do they have at each step along the way? **People:** Who do they see or talk to? **Places:** Where are they? **Things:** What digital touchpoints or physical objects would they use?	Start off with a walkthrough of features with pop-ups; Demonstrate how to make the best use of the app; Display different default expense categories / Provision to set monthly expense limit; Show past success stories; Add expense categories	Receive email if monthly limit is reached; Receive email about goals met and get rewarded; Receive email about automatic recurring bills for updation of balance	Send rewards to users for every goal met; Share a report of detailed analysis based on expense categories via email; Send graphs displaying expense trends of the user via email	Send mail regarding monthly reports; Send mail regarding tips to save money via the app; User can send email on their success story	Email feedback form for the user to fill; User could email their success story
Goals & motivations At each step, what is a person's primary goal or motivation? ("Help me…" or "Help me avoid…")	Create expense categories; Set a monthly limit; Learn how to use the app / Get comfortable with the UI; Update savings balance; Set goals and rewards	Record expenses; Limit expenses to a fixed value; Be rewarded for setting and completing goals / Receive emails to notify expenses crossing monthly limit	Rewards the user for reaching goals; Makes user aware of his expenditure trends that have to be looked into; Make user-friendly graphs for easy analysis of monthly expense report	User understands efforts and mistakes of the previous month through the report; User gets rewarded with monthly rewards for spending less than the limit; User learns where/how to save expenses in the future / User rates the app and gives feedback; Shares the app with friends	User shares their experience with the app; User fills the feedback form; User shares this app with his friends
Positive moments What steps does a typical person find enjoyable, productive, fun, motivating, delightful, or exciting?	Awareness of the skill of saving money; Motivation to achieve the goals and receive rewards	User is happy about his efforts and the rewards for the same; User feels secure; User is more aware of his expenses / User need not enter recurring expenses	User feels rewarded; User understands the need for the app; Graphical report gives clear analysis	Feeling excited about the reward and the next month; Becomes comfortable with the app	User feels accomplished about the amount saved; User finds pleasure in sharing his rewards with his friends through social media
Negative moments What steps does a typical person find frustrating, confusing, angering, costly, or time-consuming?	Time consumed in entering lots of data; Uncertainty of security breach while entering account balance related information; Uncertainty about ability to meet the goals	Each expense must be manually entered; Incorrect numbers might lead to chaos	Delay in generating reports; Textual report does not help as much	User is agitated about not being able to control expenses; User finds rating and entering feedback as a boring task	User does not enjoy filling feedback; User does not find the need to sharing their experience with others
Areas of opportunity How might we make each step better? What ideas do we have? What have others suggested?	Motivate the user with past success stories; Make user aware of the skill of saving money	Educate the user on ways to efficiently cut down expenses; Introduce the user to best practices; Educate the user about common mistakes done that kept users from reaching their goals	Show projected future expenses studying the past data related to the user; Show a leaderboard among friends to motivate user better	Show analysis of best stories and elucidate the difference in spending patterns; Show past mistakes of the user to remind the user of the same	Make the feedback form more user friendly

Need some inspiration? See a finished version of this template to kickstart your work.

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