

# Personal Expense Tracker Application

## Customer Journey Map

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Template

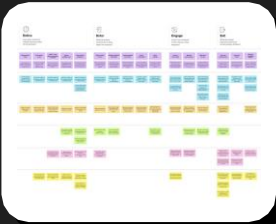


### Customer experience journey map

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.

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





Need some inspiration?  
See a finished version of this template to kickstart your work.  
[Open example](#)



#### 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" the left or right depending on the scenario you are documenting.

SCENARIO Browsing, booking, attending, and rating a local city tour	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?
<b>Steps</b> What does the person (or group) typically experience? 	<div>Customer Onboarding</div> <div>Understanding user plan</div> <div>Balance info</div> <div>Enter personal details</div> <div>Choose personal/business plan</div> <div>Enter initial account balance</div>	<div>Record expense</div> <div>Update data</div> <div>Monthly recurring bills</div> <div>Record the first expense</div> <div>Update salary/account balance/monthly limit</div> <div>Monthly recurring bill can be added for automatic reduction of amount</div>	<div>Success stories</div> <div>Closeness to rewards</div> <div>Interactive graphs for analysis</div> <div>User expense report</div> <div>Show any past success stories</div> <div>Show how close the user is to reaching his goal</div> <div>Display interactive graphical analysis of expenses for the current/prev month</div> <div>Generate a report that includes all expenses of the past month along with some analysis</div>	<div>Month-end report</div> <div>User Review</div> <div>Month-end reward</div> <div>Detailed month-end expense report generated</div> <div>Pop-up requesting user to rate the app</div> <div>Remaining unpaid balance added along with the limit 30000000 to saved points</div>	<div>User feedback</div> <div>Share App</div> <div>Share rewards earned via email</div> <div>User enters what features he expects and is not satisfied with in the app</div> <div>User shares this app with their friends</div> <div>User chooses whom to share the achievement with</div>
<b>Interactions</b> What interactions do they have at each step along the way?  <ul style="list-style-type: none"><li>■ People: Who do they see or talk to?</li><li>■ Places: Where are they?</li><li>■ Things: What digital touchpoints or physical objects would they use?</li></ul>	<div>Start off with a walkthrough of features with pop-up</div> <div>Demonstrate how to make the best use of the app</div> <div>Display different default expense categories</div> <div>Promotion to get monthly expense limit</div> <div>Show past success stories</div> <div>Add expense categories</div>	<div>Receive email if monthly limit is reached</div> <div>Receive email about goals met and get rewarded</div> <div>Receive email about automatic recurring bills for reduction of balance</div>	<div>Send rewards to users for every goal met</div> <div>Share a report of detailed analysis based on expense categories via email</div> <div>Send graphs displaying expense trends of the user via email</div>	<div>Send mail regarding monthly reports</div> <div>Send mail regarding tips to app users regarding expenses to the limit</div> <div>User can send email on their success story</div>	<div>Email feedback form for the user to fill</div> <div>User could email their success story</div>
<b>Goals &amp; motivations</b> At each step, what is a person's primary goal or motivation? ("Help me..." or "Help me avoid...") 	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
<b>Positive moments</b> What steps does a typical person find enjoyable, productive, fun, motivating, delightful, or exciting? 	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
<b>Negative moments</b> What steps does a typical person find frustrating, confusing, angering, costly, or time-consuming? 	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
<b>Areas of opportunity</b> How might we make each step better? What ideas do we have? What have others suggested? 	<div>stories</div> <div>money</div>	<div>Cut down expenses</div> <div>Plan expenses</div> <div>Reaching their goals</div>	<div>Link bank account to the user</div> <div>Motivate user better</div>	<div>Link bank account to the user</div> <div>Link pending patterns</div> <div>Link the user of the same</div>	<div>friendly</div>

