

CUSTOMER JOURNEY

GOAL :A realtor wants to develop a personalized calendar that highlights significant dates in a real estate transaction, which they can then present to their buyer client.

1. INQUIRY

Buyer sends the realtor a text or email asking: “When do we close again? When do I need to have my inspections completed? Can you please remind me of how escrow days are counted?”



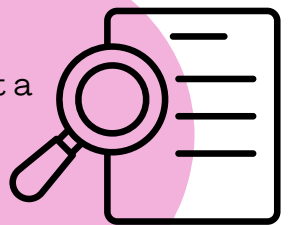
2. GATHER INFORMATION

The realtor is rushed to answer and checks their emails skimming through a bunch for a list (hoping the escrow officer or listing agent provided one) but finds none. They then go through their files and review the 30+page purchase contract. They have to count days since some dates cannot fall on a holiday, and some can. This is taking longer then expected.



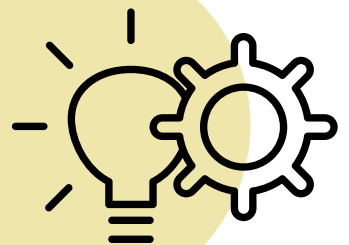
3. ASSEMBLE INFO

The realtor types out important dates in an email but realizes that a visual calendar might be the best way to present the information, as it can be confusing. Certain events cannot fall on holidays, and the 30-day transaction period can also start in the middle of the month. This will help the buyer who may ask for a reminder of the dates in the future.



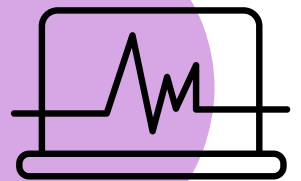
4. BRAINSTORM

The realtor plans to produce a customized calendar displaying escrow dates. Although Google Calendar is an option, explaining the process of usage to unfamiliar clients is a hassle and it doesn't cover the escrow days matter.



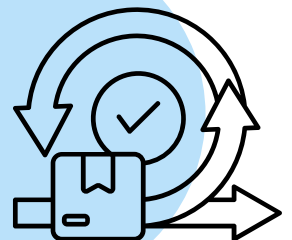
5. DRAFT

The realtor prints a custom calendar .pdf from the internet for a transaction spanning 2 months, writes important dates and marks escrow days by hand. They would also need to scan it, and send over which lacks a professional appearance. They scrap the idea.



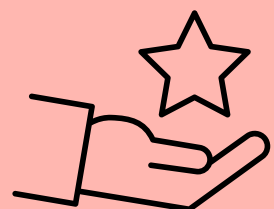
6. REVISION

The realtor manually edits a calendar .pdf with limited design skills and spends a lot of time making it look professional. The agent hopes there are no delays in the real estate deal, or else they will need to update it manually.



7. PRESENTATION

The realtor saves the calendar and sends it over as a .pdf to the buyer after emailing/texting back an answer to their original question. In that time, a few hrs have elapsed since the buyer has inquired.



8. DELIVER

A custom calendar has been delivered, and the buyer has been advised to print it out and reference it for important dates. The buyer expressed gratitude for the custom calendar, and their inquiry has been answered.

