Phase 2 Experience Design – The Monster

# User Journey Table

|  |  |  |  |
| --- | --- | --- | --- |
| Actor | Goal | System Action | Human Action |
| Sales Manager | Import leads | Validate CSV, enrich with AI | Uploads CSV or enters manually |
| AI Assistant | Provide first outreach draft | Generate draft message | - |
| Sales Manager | Ensure quality & tone | - | Reviews, edits, approves |
| Outreach Channels | Deliver messages | Send via Email/LinkedIn/WhatsApp | - |
| Prospect | Receive & respond | Track opens/clicks/replies in CRM | May reply |
| Sales Manager | Track progress & performance | Generate dashboards, KPIs | Views reports |

# Touchpoints & Emotions

- Lead Import → Confidence (structured data)

- Draft Suggestion → Uncertainty (tone fit?)

- Review → Control (human approval)

- Outreach → Neutral (depends on delivery)

- Tracking → Relief (visibility)

- Reporting → Confidence (pipeline clarity)

# Risks & Mitigations

- Over-automation → Keep human approval mandatory

- Tone mismatch → A/B test templates by locale

- Adoption resistance → Simple CRM dashboards & training

- Budget creep → Start lean with base-tier tools

# Success Criteria

- ≥50% of drafts suggested by AI

- Consistent outreach cadence per region

- CRM adopted by all sales stakeholders

- Early ROI validation (pipeline growth)