

Project Design Phase-II

Customer Journey Map

Date	10 February 2026 2025
Team ID	LTVIP2026TMIDS56419
Project Name	Calculating Family Expenses using Service Now
Maximum Marks	4 Marks

Customer Journey Map :

A Customer Journey Map is a visual representation that illustrates the complete experience a customer (or user) goes through when interacting with a product, service, or system over time. It's a strategic tool used in user experience (UX) design, marketing, and business analysis.

Key Components:

1. Journey Phases/Stages
2. Customer Actions & Behaviors
3. Emotions & Experiences
4. Touchpoints & Interactions
5. Opportunities

CUSTOMER JOURNEY MAP

SERVICENOW-BASED FAMILY EXPENSE MANAGEMENT SYSTEM

SCENARIO: Families use ServiceNow to manage daily expenses with automated aggregation, relationship-based tracking, and consolidated reporting

	Initial Setup & Configuration	Create Family Expense Records	Add Daily Expense Entries	Auto Aggregation & Tracking	Analysis & Reporting	Extended Financial Optimization
What does the person typically do?	Access ServiceNow instance and create update set for expense tracking application	Create Family Expenses table with auto-number, date, amount fields and form design	Add daily expense records with date, amount, family member, and comments	Monitor automatic aggregation of daily expenses into family expense records by date	Review consolidated expense reports and budget utilization across all family members	Set budget limits, analyze spending patterns, and optimize family finances
What interactions with the system?	Navigate to Tables, create new application menu, configure update sets	Configure form layouts, set mandatory fields, enable auto-numbering (MFE)	Use Daily Expenses form to enter data, select family members via reference field	Business rule triggers on insert/update, queries matching dates, updates parents	Access related lists, view aggregated totals, filter by date ranges and members	Create custom reports, set up dashboards, configure notifications
What are their Needs & Motivations?	Need centralized expense tracking, want organized financial records for family	Need structured data capture, want easy form customization and validation	Need quick expense entry method, want to track who spent what and when	Need automated calculations to avoid manual data entry errors and save time	Need visibility into spending trends, want accurate totals and expense breakdowns	Need financial insights, want to improve family budget planning and savings
Positive Experience & Emotions	Easy ServiceNow instance setup, intuitive table creation process and navigation	Flexible form design, auto-numbering works seamlessly with MFE prefix	Simple data entry, reference fields make family member selection very easy	Automatic aggregation works flawlessly, no manual calculation needed at all	Clear expense breakdown visible, real-time updates in related lists available	Comprehensive financial overview, empowered decision-making capabilities
Negative Experience & Frustrations	Initial learning curve for ServiceNow platform navigation and terminology	Confusion about field types and relationship setup for parent-child tables	Repetitive data entry for frequent expenses, no bulk import option initially	Business rule errors if field names don't match exactly (u_prefix issues)	Limited visualization options without custom dashboards and reporting knowledge	Need advanced ServiceNow knowledge for complex reporting and scripting
Areas of Opportunity	Provide setup wizard or guided configuration for first-time users and templates	Add expense category lookup tables, implement pre-built templates and validation	Enable bulk import from CSV/Excel, mobile app integration for quick entry	Add validation rules, error handling in business rules, audit logging	Create visualization dashboards, add budget vs actual charts and trend analysis	Implement predictive analytics, spending alerts, savings goals and recommendations

Based on stakeholder interviews and analysis requirements from Family Users

System Administrator

ServiceNow Configuration

Family Head

Budget Manager

Family Members

Expense Contributors

Financial Planner

Analysis & Reports