Customer Journey Map – Housing Market Trends

SCENARIO:

Using a Tableau dashboard to analyze housing sale prices based on age, renovation history, and features.

ENTICE

How does someone become aware of the process?

The user receives a large dataset and a request from management to generate insights on market trends.

Goal: Help me understand what the data can reveal about pricing and renovation value.

Positive Moment: Opportunity to work with visual tools instead of Excel.

Negative Moment: Feels unsure where to begin with so many fields and filters.

Opportunity: Provide a sample dashboard or story outline to follow.

ENTER

What happens when they begin the analysis process?

They open Tableau and load the dataset. They scan the available fields: sale price, renovation year, basement area, etc.

Interactions: Tableau UI, data source connection.

People: Working alone or reporting to a manager.

Places: Workplace or remote workstation.

Goal: Help me load and prep the data without confusion.

Positive Moment: Seeing data load successfully and field names appear.

Negative Moment: Overwhelm from too many columns or unclear field names.

Opportunity: Provide a "data field dictionary" with short descriptions.

ENGAGE

What happens in the core interaction moments?

User creates visualizations like KPI cards, bar charts, and pie charts to find trends.

Interactions: Filtering by "Years Since Renovation", using SUM(Sale_Price), dragging fields into columns and rows.

Goal: Help me extract the right patterns and understand relationships visually.

Positive Moments:Seeing how recent renovations lead to higher sale prices.

Creating a pie chart that cleanly separates house age groups.

Negative Moments:Trouble grouping years logically (e.g., renovation bins).

Difficulty comparing across multiple filters.

Opportunity:Pre-built templates for renovation charts.

Use grouped calculations for bins (e.g., 0–5 years, 6–10).

EXIT

What happens when the dashboard is complete?

User exports visuals, compiles them into a Word or PDF report.

Goal: Help me clearly communicate my findings to others.

Positive Moment: Final visuals look polished and insightful.

Negative Moment: Copy-pasting charts to WordPad or PowerPoint can be clunky.

Opportunity: Offer export options or dashboard story layouts with auto-caption.

EXTEND

What happens after the experience is over?

User receives feedback or requests follow-ups. The dashboard may be reused or updated.

Goal: Help me refine or build on this dashboard in future cases.

Positive Moment: Dashboard becomes a repeatable tool for future analysis.

Negative Moment: Data gets outdated or structure changes, requiring rework.

<u>Opportunity:</u> Allow users to plug in updated data with same dashboard layout.