Scenario: [Existing experience through a product or service]



How does someone become aware of this service?

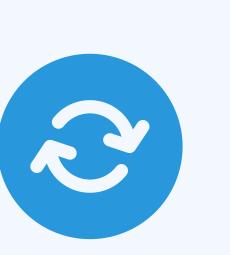


**Enter** 

Clicks link and logs into

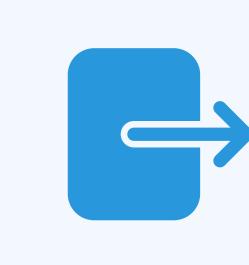
Tableau Server

What do people experience as they begin the process?



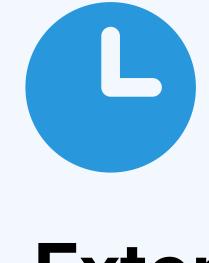
## Engage

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?



**Experience steps** 

What does the person (or people) at the center of this scenario typically experience in each step?

Receives a monthly

Sees link in internal Hears about it in weekly newsletter sales meeting

Lands on overview page with KPIs

Filters by city, product line, and renovation

Drills into Avg. Price by

Toggles chart types or uses "What-If" slider

Downloads key numbers as PDF or CSV

Shares a snapshot with stakeholders via Slack or email

Receives follow-up "Insights Digest" email

Scheduler reminds him to check next month's update



Interactions

What interactions do they have at each step along the way?

- Places: Where are they?
- Things: What digital touchpoints or physical objects do they use?

People: Who do they see or talk to?

**Goals & motivations** 

primary goal or motivation? ("Help me..." or "Help me avoid...")

**Positive moments** 

What steps does a typical person find enjoyable, productive, fun, motivating,

Product School Created in partnership with Product School

What steps does a typical person find frustrating, confusing, angering, costly, or time-consuming?

Areas of opportunity

How might we make each step better? What ideas do we have? What have others suggested?

Places: Company mentions the dashboard

Things: Email link, newsletter graphic on-duty analyst

Appreciates clear KPI

cards (Avg. Price,

Count, Renovation %) at

the top.

Confused by Tableau's

login redirects if

credentials expired.

**Places:** Tableau Server login page

People: Collaborates

with marketing and ops

filters, tooltips pop-ups

Places: On-screen

dynamic tooltips

**Things:** Filter pane, sparkline header,

**People:** Shares with VP of Sales and marketing

dialogue, Slack thread

Places: Download

**People:** Colleagues reference last month's insights

• Places: Confluence project page

Things: Automated email summary, calendar reminder

At each step, what is a person's

delightful, or exciting?

**Negative moments** 

Personalize email subject ("Your July Housing Insights Are Ready!").

Feels anticipation when

the "Dashboard

Update" lands.

Overlooked if the email

subject is generic.

Offer a "Remember me" checkbox or single-sign-on.

Auto-persist filter selections between

reset unexpectedly on

drill-down.

Add a "Last refreshed"

Happy that PDF retains the same styling as the live dashboard.

one-page summary in email without logging in

Pleased to get a

Forget dashboard until the next reminder arrives—no "daily glance" option.

Enjoys instant tooltips Likes how the "What-If"

slider animates revenue

Annoyed if data refresh

lags, showing stale

numbers.

comparing city vs.

Provide customizable export templates (portrait vs. landscape).

Disappointed when

exports truncate axis

Build a lightweight mobile notification or Slack bot that pings when key metrics shift.

See an example