A user journey is a series of steps
(typically 4-12) which represent a scenario
in which a user might interact
with the thing you are designing.

- How users **currently** interact with the service / website / product

- How users **could** interact with it

- Includes online and offline interactions

- Demonstrating the vision for the project

- Understanding user behavior

- Identifying possible functionality at a high level

- Help in defining your taxonomy and interface

https://theuxreview.co.uk/user-journeys-beginners-guide/

- Context: Where is the user?

- Progression: Get to the next step?

- Devices: Type? Novice or expert?

- Functionality: Expectation?

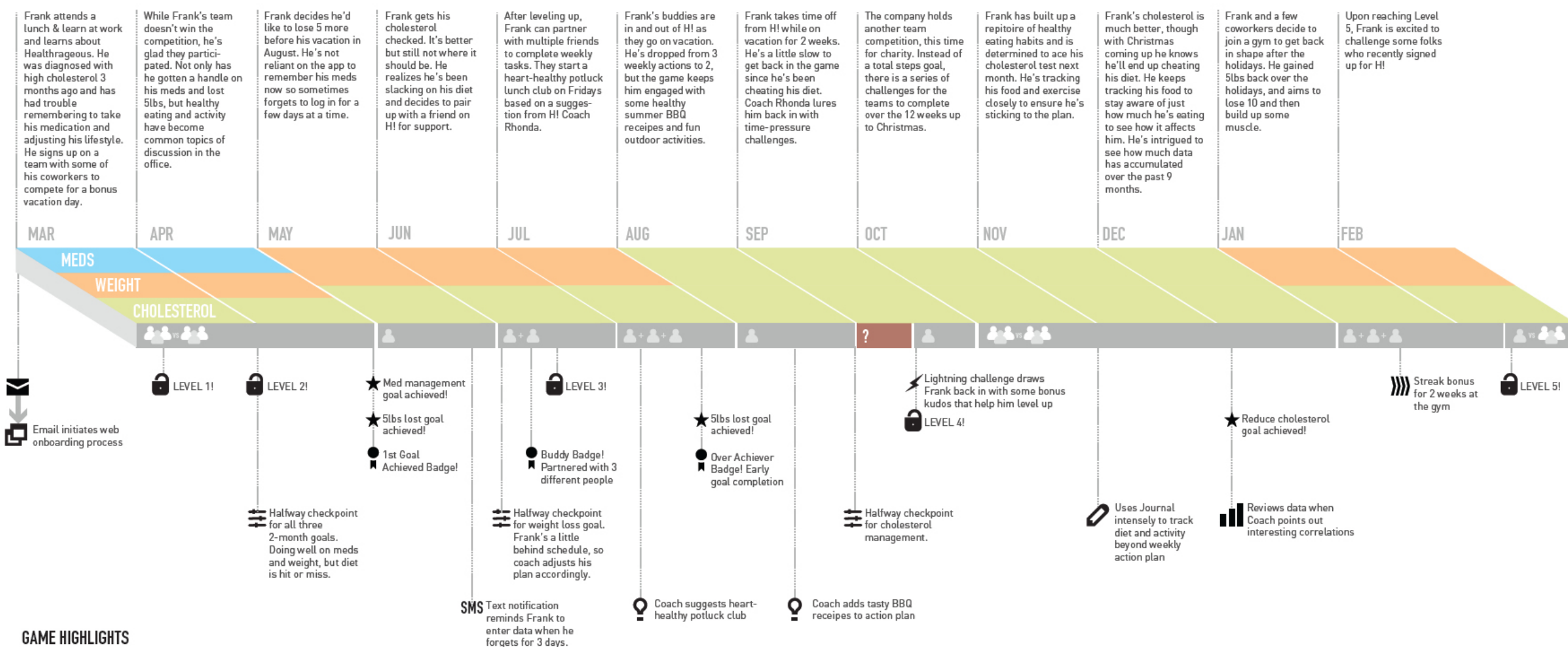- Emotion: How do they feel?

Goals

Elevator Pitch

Personas & scenarios

Branding

User Journey

mad★pow

FRANK
43, Call Center Manager, Family Man
Recently diagnosed with high cholesterol

GADGETS: Pedometer, Wireless Scale in Office, Smartphone
GOALS: 100% Med Adherence, Lose Weight, Reduce Cholesterol

MAR — Frank attends a lunch & learn at work and learns about Healthrageous. He was diagnosed with high cholesterol 3 months ago and has had trouble remembering to take his medication and adjusting his lifestyle. He signs up on a team with some of his coworkers to compete for a bonus vacation day.

APR — While Frank's team doesn't win the competition, he's glad they participated. Not only has he gotten a handle on his meds and lost 5lbs, but healthy eating and activity have become common topics of discussion in the office.

MAY — Frank decides he'd like to lose 5 more before his vacation in August. He's not reliant on the app to remember his meds now so sometimes forgets to log in for a few days at a time.

JUN — Frank gets his cholesterol checked. It's better but still not where it should be. He realizes he's been slacking on his diet and decides to pair up with a friend on H! for support.

JUL — After leveling up, Frank can partner with multiple friends to complete weekly tasks. They start a heart-healthy potluck lunch club on Fridays based on a suggestion from H! Coach Rhonda.

AUG — Frank's buddies are in and out of H! as they go on vacation. He's dropped from 3 weekly actions to 2, but the game keeps him engaged with some healthy summer BBQ receipes and fun outdoor activities.

SEP — Frank takes time off from H! while on vacation for 2 weeks. He's a little slow to get back in the game since he's been cheating his diet. Coach Rhonda lures him back in with time-pressure challenges.

OCT — The company holds another team competition, this time for charity. Instead of a total steps goal, there is a series of challenges for the teams to complete over the 12 weeks up to Christmas.

NOV — Frank has built up a repitoire of healthy eating habits and is determined to ace his cholesterol test next month. He's tracking his food and exercise closely to ensure he's sticking to the plan.

DEC — Frank's cholesterol is much better, though with Christmas coming up he knows he'll end up cheating his diet. He keeps tracking his food to stay aware of just how much he's eating to see how it affects him. He's intrigued to see how much data has accumulated over the past 9 months.

JAN — Frank and a few coworkers decide to join a gym to get back in shape after the holidays. He gained 5lbs back over the holidays, and aims to lose 10 and then build up some muscle.

FEB — Upon reaching Level 5, Frank is excited to challenge some folks who recently signed up for H!

MEDS | WEIGHT | CHOLESTEROL

✉ Email initiates web onboarding process

🔒 LEVEL 1!

🔒 LEVEL 2!

★ Med management goal achieved!
★ 5lbs lost goal achieved!
● 1st Goal Achieved Badge!

⇄ Halfway checkpoint for all three 2-month goals. Doing well on meds and weight, but diet is hit or miss.

🔒 LEVEL 3!

★ Buddy Badge! Partnered with 3 different people

SMS Text notification reminds Frank to enter data when he forgets for 3 days.

⇄ Halfway checkpoint for weight loss goal. Frank's a little behind schedule, so coach adjusts his plan accordingly.

🔒 Coach suggests heart-healthy potluck club

★ 5lbs lost goal achieved!
● Over Achiever Badge! Early goal completion

💡 Coach adds tasty BBQ receipes to action plan

⚡ Lightning challenge draws Frank back in with some bonus kudos that help him level up

🔒 LEVEL 4!

⇄ Halfway checkpoint for cholesterol management.

✎ Uses Journal intensely to track diet and activity beyond weekly action plan

★ Reduce cholesterol goal achieved!

📊 Reviews data when Coach points out interesting correlations

⫸ Streak bonus for 2 weeks at the gym

🔒 LEVEL 5!

GAME HIGHLIGHTS

🔄 SCHEDULED NOTIFICATIONS | DAILY 📱 Mobile medication reminders & logging | FRIDAY ✉ End-of-week checkpoint | SUNDAY ✉ Summary of past week | MONTHLY ✉ Goal progress & maintenance report

SAMPLE ACTION PLANS & KUDO SCORES

	WEEK 1 [MAR]	WEEK 8 [APR]	WEEK 18 [JUL]	WEEK 22 [AUG]	WEEK 27 [SEP]	WEEK 36 [NOV]	WEEK 47 [FEB]
	✓ Take medication when reminded by H! mobile app	✓ Take medication without being reminded by H! mobile app	✗ Cook 3 healthy meals this week	✓ Healthy BBQ with family	✓ Make a healthy fruit dessert [do it tonight for bonus kudos!]	✓ Track meals in journal	✓ Go to the gym 4x
	✗ Walk 2500 steps per day [for team competition]	✓ Walk 4500 steps per day [for team competition]	✓ Go for a 5-mile bike ride	✗ Swim for 5 hours	✓ Walk 5000 steps per day	✓ Eat 15 servings of veggies [for team competition]	✓ Pack a new lunch food for you and the kids
	✓ Buy olive oil to use instead of butter	✓ Play frisbee with the kids	✓ Healthy potluck lunch [with Jim, Sally, Mark]				✓ Walk more than a Level 1 group [versus Erik, Yang, Cory]
	2 1 per action	**18** 1 per action + x2 completion bonus + x2 competition kudos for 3rd place	**19** 1 per action + 8 co-op bonus + 10 goal completion bonus	**5** 1 per action - 1 sponsor penalty + 5 goal checkpoint evaluation	**14** 1 per action + 5 lightning bonus + x2 completion bonus	**4** 1 per action + 2x completion bonus	**26** 1 per action + 8 streak bonus + 4 challenge win + x2 completion bonus

SAMPLE MAP

| PURCHASE PHASES | AWARENESS | RESEARCH & CONSIDERATION | PURCHASE | POST PURCHASE |

Meet Jane, a member of your Young Parents segment. She is feeling overwhelmed about healthcare and has no idea where to start. She goes to the state's exchange website, but soon becomes frustrated and procrastinates.

She runs into her friend Amy and asks about healthcare plans. Amy suggests looking at Coolsure. This map depicts her purchase journey.

➕ Positive Experience

0 Neutral Experience

➖ Negative Experience

➕ Jane sends out a tweet polling her network "looking 4 health plan. Ideas?" 3 out of 10 responses recommend Coolsure.

➖ Jane goes to the website but there are too many choices and she doesn't know which one is best. Jane also receives a tweet from another friend, Sara, saying, "Don't do Coolsure, my son's surgery coverage was a nightmare"

0 Jane googles Coolsure to read comments and reviews, most of which seem very positive.

➕ Feeling encouraged, Jane decides to apply online.

➖ Jane soon realizes she doesn't know how to answer all of the questions on the online forms, and gives up and calls for help.

➖ Jane waits for 15 minutes on hold hearing, "Your call is very important to us" play over and over. Her young daughter starts to cry and just as she is about to hang up, her call is answered by agent Sam.

➕ Agent Sam listens carefully to Jane's needs and recommends the best plan for her family. Sam offers to help Jane complete her application over the phone. Jane gratefully accepts.

0 After the call, Jane is a bit apprehensive and wonders if she made the right choice and if all the paperwork went through correctly.

➕ Jane receives a confirmation text and email that she has been approved. She gives a huge sigh of relief. On her start date, she is greeted with a welcome email detailing her plan and helpful tips for her family's needs.

Jane is a very satisfied customer and rates your company a 9 out of 10 on your follow-up customer satisfaction survey, remembering to include Sam's name. Jane tweets "Now a Coolsure customer. Nice people, here is hoping the coverage is just as good!"

MOMENTS OF TRUTH

Moments of Truth are the most critical steps in your journey. Get them wrong, and you lose customers. Get them right, and your customers become lifelong advocates. These should be your top priorities.

🄣 A Moment of Truth

1. The first moment of truth occurs when Jane looks on your website. If she can't quickly find what she's looking for, she moves on to Google and may end up selecting one of your competitors.

2. Your second moment of truth is the application process. One fourth of all applications are abandoned before completion, and many of these potential applicants never end up registering with you.

3. Your third moment of truth is the first month of coverage. Customers who report a 9 or a 10 in their onboarding survey renew at 75%, versus 25% for those who give you a 0-6 in their initial survey.

CUSTOMER PROFILE

👥 44%
👥 56%

68% Suburban
25% Urban
7% Rural
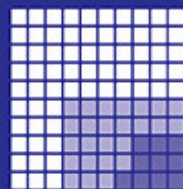
65 Promoters
25 Passives
10 Detractors

42% 2 children
33% 1 child
25% 3+ children

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WHAT YOUR CUSTOMERS HAD TO SAY

➕ "I love the short emails that come every month with healthy tips. They help me stay on track."

0 "Your phone support is terrific – they always help me out. I just wish I didn't have to call them so often."
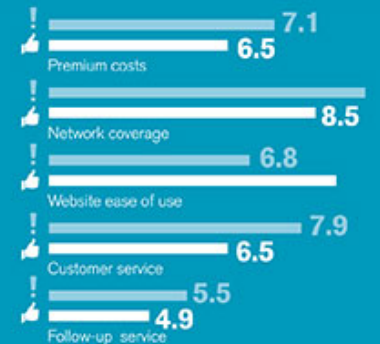
➖ "When I shop for auto insurance it's really easy. I put in my information and up pops three quotes. But choosing health insurance is a job–and one I don't enjoy."
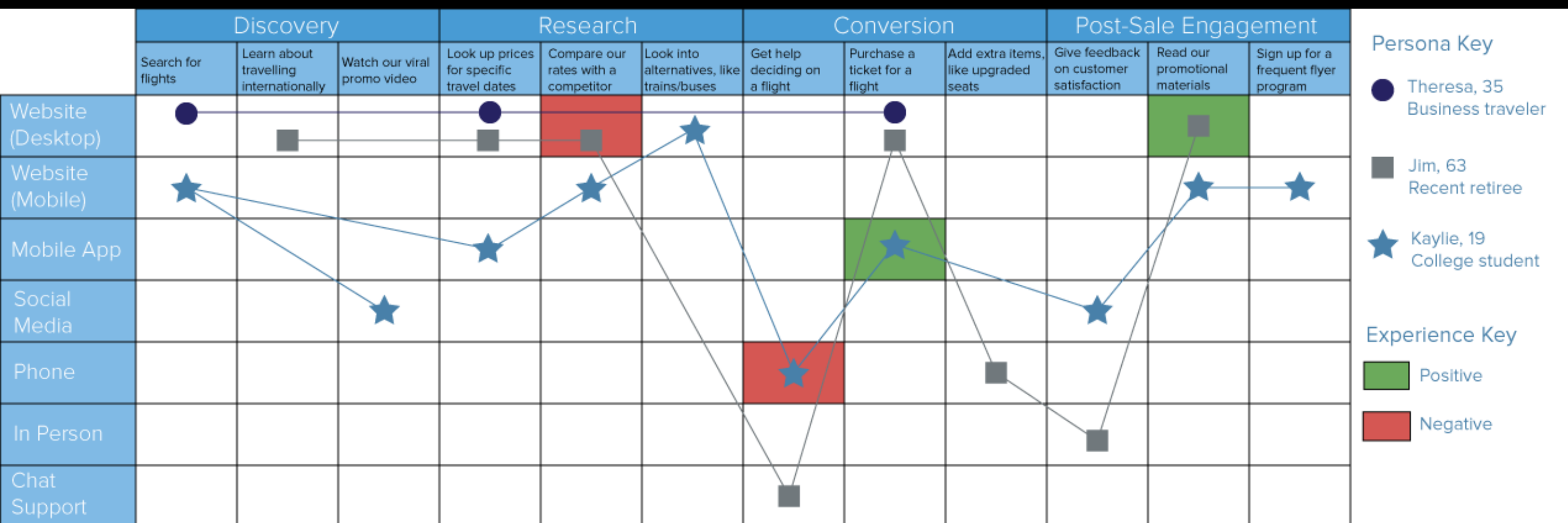
➖ "The only problem is there are so many choices. There is a lot to think about and I felt it was hard to figure out what was best."

IMPORTANCE & SATISFACTION

How important your customers felt the interface or touch point was, and how satisfied they were.

❗ Importance 👍 Satisfaction

	Importance	Satisfaction
Discovering available plans	7.3	7.7
Application process	8.7	6.5
Premium costs	7.1	6.5
Network coverage		8.5
Website ease of use	6.8	7.9
Customer service		6.5
Follow-up service	5.5	4.9

	Discovery			Research			Conversion			Post-Sale Engagement		
	Search for flights	Learn about travelling internationally	Watch our viral promo video	Look up prices for specific travel dates	Compare our rates with a competitor	Look into alternatives, like trains/buses	Get help deciding on a flight	Purchase a ticket for a flight	Add extra items, like upgraded seats	Give feedback on customer satisfaction	Read our promotional materials	Sign up for a frequent flyer program
Website (Desktop)	●			●	▦			▪			▦	
Website (Mobile)	★			★		★					★	★
Mobile App				★				★				
Social Media			★							★		
Phone							★		▪			
In Person										▪		
Chat Support							▪					

Persona Key

● Theresa, 35 Business traveler

▪ Jim, 63 Recent retiree

★ Kaylie, 19 College student

Experience Key

🟩 Positive

🟥 Negative

https://www.mycustomer.com/sites/default/files/customer-journey-map-with-good-and-bad-experiences.png

JEN KRAMER, INSTRUCTOR
PLANNING SUCCESSFUL WEBSITES & APPS

CLASS FIVE
A USER JOURNEY

Current state:
Paying healthcare bills online
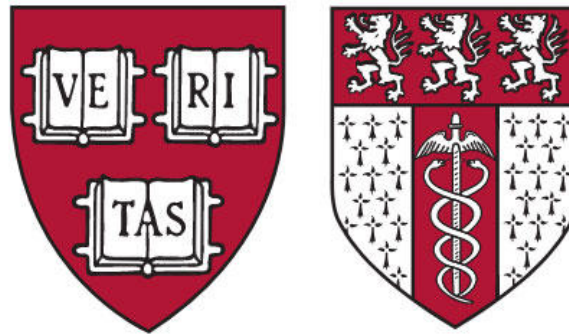
HARVARD UNIVERSITY
Health Services

DO NOT SEND CASH OR CREDIT CARD INFORMATION WITH THIS FORM.

To pay by credit card, please call our office.

- Context: Where is the user?

- Progression: Get to the next step?

- Devices: Type? Novice or expert?

- Functionality: Expectation?

- Emotion: How do they feel?

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- Context: Where is the user? At home in the evening

- Devices: Type? NONE
                    Novice or expert? Expert

- Functionality: Expectation? Why can't I pay my bill online with my debit card?

- Emotion: How do they feel? Frustrated!

Proposed state:
Paying healthcare bills online
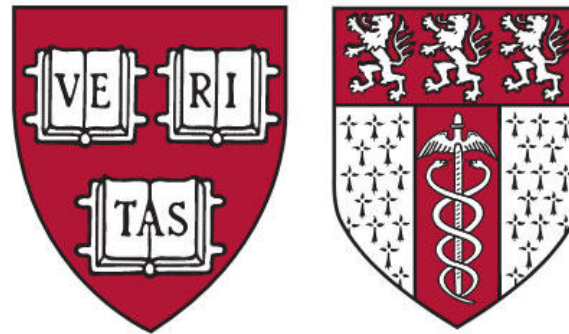
HARVARD UNIVERSITY

Health Services

Jen, You have a bill from HUHS!

It is for $25.00!

It is due on June 12!

View your bill
Pay your bill

Receive bill by email (desktop)
instead of US mail
Benefits: more immediate, easy paper trail

HUHS Patient Portal

You currently owe $25.00, due on June 12.

[Pay your bill online]

Call 617-xxx-xxxx to pay your bill by phone

Mail your payment to XYZ

Access patient portal (desktop)
Benefits: quicker bill pay, fewer employees
required to accept credit cards

HUHS Patient Portal

You currently owe $25.00, due on June 12.

Pay with your HSA debit card on file

Pay with a new card

Contact us with questions

Still in patient portal (desktop)
Benefits: Fast bill pay, no need to re-enter information,
high convenience

- Context: Where is the user?

- Progression: Get to the next step?

- Devices: Type? Novice or expert?

- Functionality: Expectation?

- Emotion: How do they feel?

https://theuxreview.co.uk/user-journeys-beginners-guide/

- Context: Where is the user? At home in the evening

- Devices: Type? Desktop
  Novice or expert? Expert

- Functionality: Expectation? Click and pay the bill!

- Emotion: How do they feel? Happy!

- How users **currently** interact with the service / website / product

- How users **could** interact with it

- Includes online and offline interactions

https://theuxreview.co.uk/user-journeys-beginners-guide/

- Context: Where is the user?

- Progression: Get to the next step?

- Devices: Type? Novice or expert?

- Functionality: Expectation?

- Emotion: How do they feel?

WHAT'S NEXT?

- Outline another user journey – you may have several or just a few, depending on the focus of your project.

  - Same persona, different part of the site

  - Different persona, same part of the site

  - Emphasize different qualities of the experience (emotion, devices, context, etc)