# UNDERSTANDING AND DESIGNING PERSONAS AND CUSTOMER JOURNEY MAPS

MIS3506 - Lavin – Spring 2026

# LEARNING OBJECTIVES

By the end of this lecture, you will be able to:

• Understand and develop a user persona

•  Define what a Customer Journey Map (CJM) is and its purpose in UX design

• Identify the five key stages of the customer journey

• Understand different types of touchpoints and their impact

• Explain why CJMs are critical for business success and user experience

• Create a basic customer journey map using established methodologies

# PERSONAS & CUSTOMER JOURNEY MAPS

- Primary tool to move away from assumptions

- Focus on evidence based, user centric design

- Remove the guesswork and provide deep understanding of the user

# PERSONAS: UNDERSTANDING THE WHO

- Fictional, yet realistic archetype

- Grounded in research

- Includes demographics, behaviors, motivations, goals & frustrations

# PERSONAS: UNDERSTANDING THE WHO
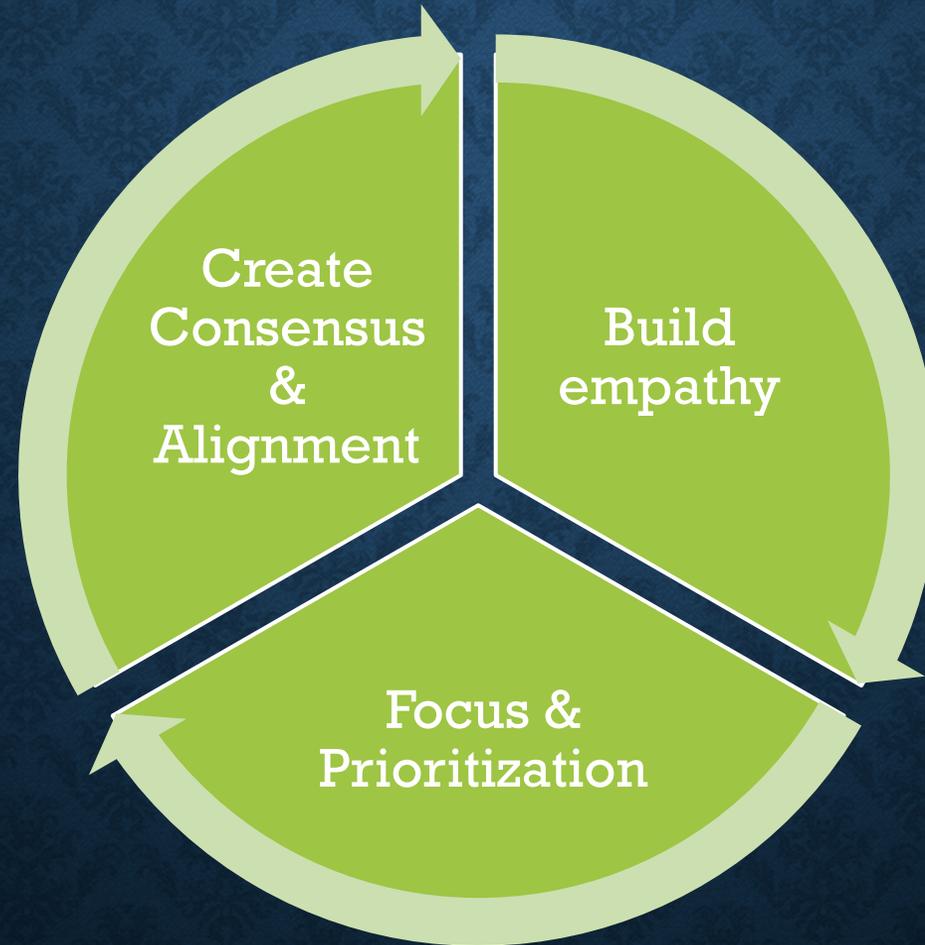
# Intended Users – "People"

How do we obtain knowledge about the people involved?

People

▷ Interviews

▷ Observations

▷ Secondary Research

▷ LinkedIn, Social Media Channels

How do you develop a persona for your users?

**People**

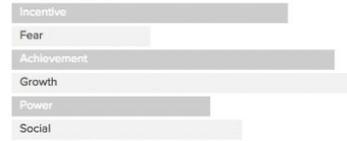# Developing a Persona:

Why?
What should be included?
Comfort with technology?

# Simple User Persona Example: Sarah, The Financial Optimizer

## Sarah Chen

**Change Avatar**

**Name**
Sarah Chen

**Job Title**
Financial Analyst II

**Age**
27

**Highest Level of Education**
Bachelor's in Finance

**Social Networks**

**Industry**
Financial Services

## Goals or Objectives

- Save post-tax income
- Build 6-month emergency fund
- Start investing
- Achieve financial independence

## They Gain Information By

- Personal finance influencers
- r/personalfinance and r/FIRE
- Finance podcasts
- Asking ChatGPT

## Preferred Method of Communication

Slack, Email, Text, Video calls

## Job Responsibilities

- Analyze financial statements
- Investment recommendations
- Prepare client presentations
- Monitor portfolio performance

## Biggest Challenges

- Investment analysis paralysis
- No clear path to retirement goal
- Conflicting financial advice
- Lifestyle inflation

## Tools They Need to Do Their Job

Excel, Bloomberg Terminal, HubSpot, Power BI

## Their Job Is Measured By

- Accuracy of financial projections
- Client portfolio performance
- Reports delivered on time
- New business development

## Reports to

Senior Financial Advisor
VP of Wealth Management
Compliance Officer

https://www.hubspot.com/make-my-persona/persona-examples

# WHAT IS A CUSTOMER JOURNEY MAP?

- Definition:

- A visual representation of the process customers go through when interacting with your company, from first awareness to advocacy.

- Key Characteristics:

- • Documents the entire customer story across all touchpoints

- • Focuses on one specific customer persona for accuracy

- • Maps both functional steps AND emotional states

- • Creates a chronological timeline of the customer experience

- • Serves as a shared reference point for cross-functional teams

The Customer Journey

**emfluence** — ONE-TO-ONE, AND THEN SOME.

**Sample Persona**
Job Title / Industry:
Age:
Job Role

| | 1 AWARENESS | 2 CONSIDERATION | 3 CONVERT | 4 LOYALTY | 5 ADVOCACY |
|---|---|---|---|---|---|
| | Researching options | Getting educated on services/benefits | Confirming the partnership | Continuing to use services & request support | Recommending service to colleagues |
| **Journey steps** | Conducts online search · Sees sponsored ads/content · Asks peers for advice · Attends Conference · Downloads Website Content | Requests Info/Pricing · Needs Assessment · Sales Presentation · Shops Competitors · Requests Agreement | Signs Agreement · Undergoes Training · Accesses New Account · Initiates First Test · Makes Payment | Schedules an Account Review · Contacts Customer Support · Makes an Account Change Request · Reads blogs and Attends Webinars | Completes a Survey · Rates Services · Provides testimonial or referral to a peer |
| **CHANNELS** | Search · Paid Media · Social · Conference · Website | Website · Email · Call · Face-to-face | ESP · Email · Call · Face-to-face | Sales Email · Call · Face-to-face · Marketing Email | Marketing Emails · Referral |
| **KEY METRICS** What KPI's has the customer hit? | • Impressions (organic & paid) • Clicks • Sessions • Follows, likes, etc. • Gated lead capture | • Leads • Opportunity Stages • Website engagement | • Signed agreements • ESP Logins • First purchase/enrollment • Closed/Won Opportunities | • Business-specific KPIs • Annual Revenue from account | • Satisfaction Rating • NPS |
| **RESPONSES** How does the brand address customers' concerns? | Blog, social posts, branded research, marketing emails, white papers, case studies, webinars | Marketing brochures, sales call, needs assessment, integration needs analysis, ROI calculator, FAQs, benefits overview, upsell for program consistency, sales email, creative solutions, presentation of differentiators | Scripted onboarding welcome email from sales, training, account management, brand | Account management FAQs Blogs to support ongoing knowledge | Survey |
| **OPPORTUNITIES** How can we improve the experience? | | • Behavior targeted email with competitive matrix • Low-funnel paid-media • Disqualified lead survey • Win-back campaign for closed lost leads | • New account welcome series • New account nurture campaign to engage • Newsletter permission campaign • Inactive user re-engagement campaign • Lapsed customer re-activation campaign | • LinkedIn Ads for Webinar Invites & whitepaper downloads • Dynamic Newsletter Content by Industry, etc • Milestone Email (annual activity summary) | • Rating Invite Series • Create process for gathering and showcasing testimonials • Rewards Program • Advocacy Forum |

# WHY CUSTOMER JOURNEY MAPS MATTER

- Strategic Benefits:

- • Simplify complex customer journeys into understandable visuals

- • Build empathy by putting you in the customer's shoes

- • Align cross-functional teams (marketing, sales, UX, support)

- • Identify pain points and optimization opportunities

- • Drive measurable business results

- Impact Statistics:

- • 90% of companies using CJMs saw decreased churn rates

- • Improved customer retention and purchase frequency

- • Enhanced brand loyalty and advocacy

# THE FIVE STAGES OF THE CUSTOMER JOURNEY

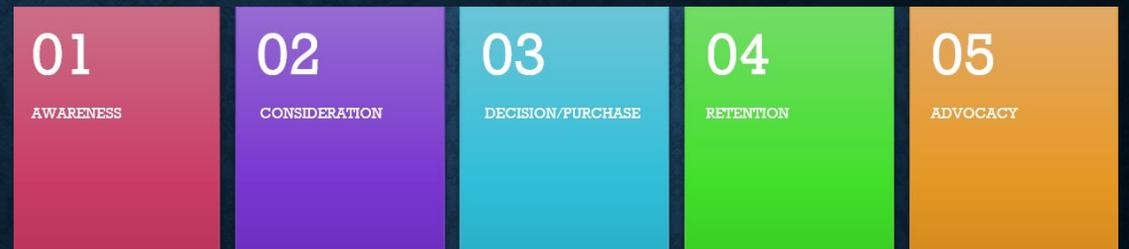| 01 | 02 | 03 | 04 | 05 |
|---|---|---|---|---|
| AWARENESS | CONSIDERATION | DECISION/PURCHASE | RETENTION | ADVOCACY |

# THE FIVE STAGES OF CUSTOMER JOURNEY

1. Awareness

   • First discovery of your brand/product

   • Through ads, social media, word-of-mouth, search

How do potential customers know that you exist?  How do they find you?

| 01 | 02 | 03 | 04 | 05 |
|---|---|---|---|---|
| AWARENESS | CONSIDERATION | DECISION/PURCHASE | RETENTION | ADVOCACY |

# THE FIVE STAGES OF CUSTOMER JOURNEY

2. Consideration

- Evaluating whether they need your product or service

- Comparing with competitors and alternatives

What makes your product or service attractive?  Why should the customer choose you?

| 01 | 02 | 03 | 04 | 05 |
|----|----|----|----|----|
| AWARENESS | CONSIDERATION | DECISION/PURCHASE | RETENTION | ADVOCACY |
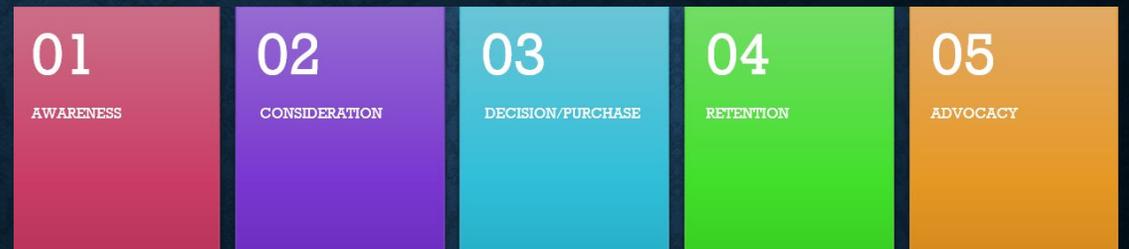
# THE FIVE STAGES OF CUSTOMER JOURNEY

3. Decision/Purchase

   - Decide whether or not they will purchase your product/service

   - Will they purchase at all?

   Will the customer purchase your product and service?  What steps are involved?

| 01 | 02 | 03 | 04 | 05 |
|---|---|---|---|---|
| AWARENESS | CONSIDERATION | DECISION/PURCHASE | RETENTION | ADVOCACY |
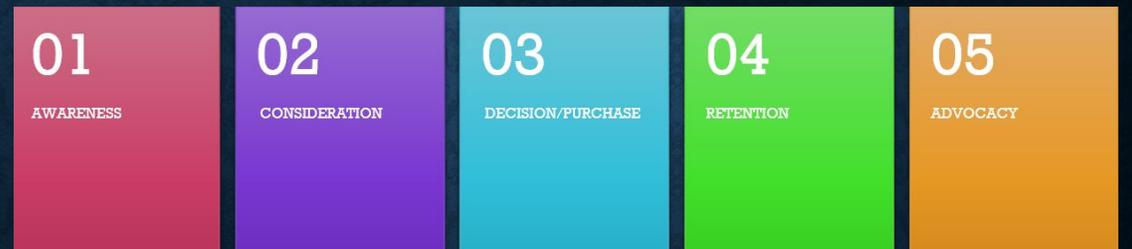
# THE FIVE STAGES OF CUSTOMER JOURNEY

4. Retention

   - The customer journey doesn't end once they make the purchase

   - How do you keep your customers from leaving?

How does your company retain customers and keep them loyal to your brand?

| 01 | 02 | 03 | 04 | 05 |
|---|---|---|---|---|
| AWARENESS | CONSIDERATION | DECISION/PURCHASE | RETENTION | ADVOCACY |
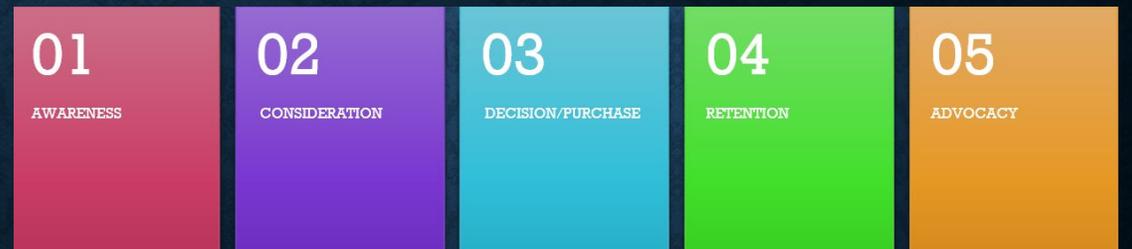
# THE FIVE STAGES OF CUSTOMER JOURNEY

5. Advocacy

- Letting others know about your product/service
- Completely satisfied customers are more likely to advocate

Will your current customers share positive experiences about your product/service?

| 01 | 02 | 03 | 04 | 05 |
|----|----|----|----|----|
| AWARENESS | CONSIDERATION | DECISION/PURCHASE | RETENTION | ADVOCACY |

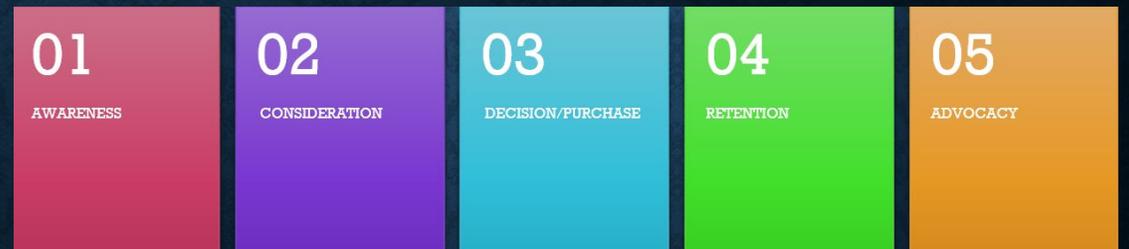## EXAMPLE: FIRST-TIME ONLINE GROCERY SHOPPER

- AWARENESS STAGE
- • Sees social media ad for grocery delivery
- • Emotion: Curious but skeptical

- CONSIDERATION STAGE
- • Visits website, compares prices with local store
- • Reads reviews and delivery policies
- • Emotion: Interested but concerned about quality

- DECISION STAGE
- • Downloads app, creates account, places first order
- • Emotion: Excited but anxious about delivery

- RETENTION STAGE
- • Receives order, evaluates quality and convenience
- • Uses customer support for missing item
- • Emotion: Satisfied with resolution

- ADVOCACY STAGE
- • Recommends service to friends and family
- • Leaves positive review
- • Emotion: Loyal and confident

# UNDERSTANDING CUSTOMER TOUCHPOINTS

### PRE-PURCHASE TOUCHPOINTS

- • Website visits
- • Social media interactions
- • Advertisement exposure
- • Word-of-mouth referrals
- • Content consumption
- • Email marketing
- • Search engine results

- Focus: Persuasion and education

### PURCHASE TOUCHPOINTS

- • Online checkout process
- • In-store experience
- • Sales interactions
- • Payment processing
- • Confirmation communications

- Focus: Satisfaction and efficiency

### POST-PURCHASE TOUCHPOINTS

- • Customer support
- • Product delivery
- • Onboarding experience
- • Follow-up communications
- • Loyalty programs
- • Feedback requests

- Focus: Satisfaction and retention

# MAPPING CUSTOMER EMOTIONS

- Why Emotions Matter:
- • Customers make decisions based on feelings, not just logic
- • Emotional experiences drive loyalty and advocacy
- • Pain points create abandonment and negative word-of-mouth

- Key Emotional States to Track:
- • Excitement and anticipation
- • Confusion and frustration
- • Satisfaction and delight
- • Trust and confidence
- • Disappointment and anger

- UX Design Opportunity:
- Transform negative emotions into positive ones through thoughtful design interventions
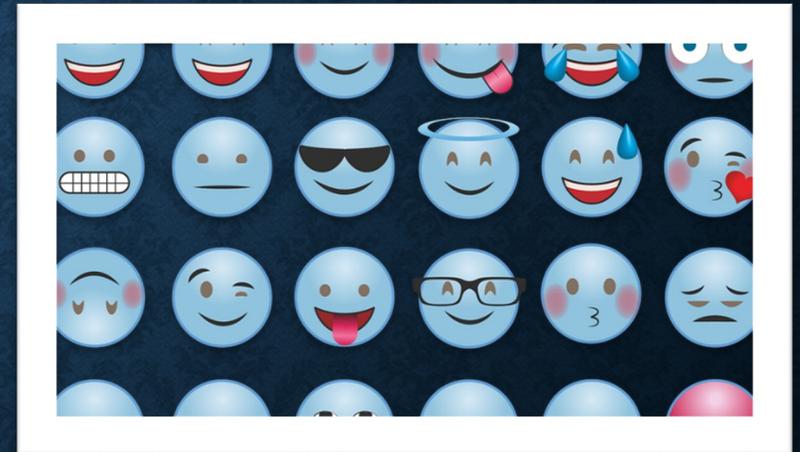
# HOW TO CREATE A CUSTOMER JOURNEY MAP

1. SET CLEAR OBJECTIVES

- Why are you creating this map?

- What specific problems are you trying to solve?

2. IDENTIFY AND FOCUS ON ONE PERSONA

- Avoid generic maps - be specific

- Use real customer data and research

3. LIST ALL TOUCHPOINTS

- Every interaction point with your brand

- Include digital and physical touchpoints

# HOW TO CREATE A CUSTOMER JOURNEY MAP

4. WALK THE JOURNEY YOURSELF

- Experience your own product/service
- Test competitor experiences for comparison

5. VISUALIZE AND COLLABORATE

- Use templates and mapping tools
- Make it accessible to all team members

# CONSIDERATIONS FOR YOUR CJM

| Component | Description |
|---|---|
| Persona / Customer Segment | Defines *who* is experiencing the journey. |
| Stages / Phases | The key steps a customer takes (e.g., Awareness → Consideration → Purchase → Use → Support → Loyalty). |
| Touchpoints | Where the customer interacts with the brand (e.g., website, mobile app, social media, customer service). |
| Actions | What the customer does at each stage (e.g., searching, comparing, purchasing). |
| Emotions | How they feel during the journey (e.g., frustrated, excited, confused). |
| Pain Points | Barriers that prevent a smooth experience. |
| Opportunities | Areas where design and business improvements can make the journey better. |

| Customer Journey Mapping | Connection to UX Design |
|---|---|
| **Customer-first perspective** | Guides UX designers to design for **real user needs**, not assumptions. |
| **Stages → User flows** | Each stage informs **user flows** and wireframes for digital experiences. |
| **Pain points → UX problems** | Highlights **what to fix** in interfaces or interactions. |
| **Touchpoints → Multichannel design** | Encourages designers to create **consistent experiences** across devices (web, mobile, in-store). |
| **Emotions → Empathy in design** | Helps teams design interfaces that **match the user's mindset** at each step. |
| **Opportunities → Feature roadmap** | Directly shapes **feature prioritization** and the UX product backlog. |

# BUSINESS IMPACT AND ROI

Measurable Benefits:

• 90% reduction in customer churn and complaints

• Faster sales cycles through optimized touchpoints

• Increased customer lifetime value

• Higher conversion rates at key decision points

• Improved cross-team collaboration and alignment

For UX Designers:

• Better user research insights

• More strategic design decisions

• Stronger business case for UX improvements

• Enhanced stakeholder buy-in

• Data-driven design validation

Long-term Value:

• Sustainable competitive advantage

• Stronger brand loyalty and advocacy

• Reduced customer acquisition costs

# KEY TAKEAWAYS

- CJMs are empathy tools that drive strategic business decisions

- Focus on one persona at a time for maximum impact

- Map both functional steps AND emotional states

- Use CJMs to align teams and identify optimization opportunities

- The journey doesn't end at purchase - retention and advocacy matter

- **Journey maps drive empathy** – they remind designers that every screen is part of a *larger story*.

- **Guide design decisions** – ensuring features solve real customer pain points.

- **Align stakeholders** – a visual map helps business, tech, and design teams **work from the same understanding**.

- **Measure success** – changes to the UX can be tied back to **specific stages** and **emotions** in the journey.

- You cannot effectively map a journey until you know *whose* journey you are mapping. The motivations and frustrations defined in the **Persona** provide the necessary context for interpreting the actions and emotions depicted in the **Customer Journey Map**.

- In short, personas ensure you are solving the right problems for the right people, and journey maps ensure you are solving them at the right time and in the right context.

# NEXT STEPS

- ICA:

- • Consider your persona and brand for Project 1

- • Map your personal journey through their experience

- • Identify 3 pain points and 3 moments of delight

- • Propose UX improvements for one key touchpoint


- Questions for Discussion:

- What recent customer experience stood out to you as particularly frustrating or delightful?

| Stage | Customer Actions | Touchpoints | Emotions | Opportunities |
|---|---|---|---|---|
| Consideration | Researches, compares | Website, reviews, social media | Hopeful, cautious | Easy navigation, transparent info |
| Decision | Adds to cart, seeks validation | Website, chat, reviews | Confident, anxious | Live support, clear policies |
| Purchase | Completes transaction | Checkout, email | Excited, relieved | Smooth process, instant confirmation |
| Onboarding/Delivery (Post Purchase) | Receives product, sets up | Packaging, guides, support | Eager, uncertain | Helpful onboarding, proactive support |
| Usage (Post Purchase) | Uses product, seeks help | Product, support | Satisfied, frustrated | User-friendly design, responsive support |
| Loyalty (Post Purchase) | Engages, repeats purchase | Emails, loyalty programs | Valued, connected | Personalized offers, community |
| Advocacy | Recommends, reviews | Social media, referrals | Proud, enthusiastic | Referral incentives, recognition |

# CUSTOMER JOURNEY MAP VS USER STORY MAP

## Customer Journey Map

PURPOSE:
Understand the overall customer experience

FOCUS:
• Customer emotions and motivations
• Cross-channel touchpoints
• Business relationship over time

USE CASE:
• Strategy and experience design
• Identifying pain points
• Aligning teams on customer needs

TIMELINE:
Entire relationship lifecycle

## User Story Map

PURPOSE:
Plan features and functionality

FOCUS:
• Specific user tasks and goals
• Product features and workflows
• Development priorities

USE CASE:
• Agile development planning
• Feature prioritization
• Sprint planning

TIMELINE:
Single interaction or task flow

GOOD JOB U FINNISHED UP      --- CATIE THE BEST KID EVER!!!!!!