

What does this stage involve?

- △ **When to use it:** We use this after completing the worksheets **What do your customers want to achieve?** and **When does the experience start and end?** If you're short of time and working to improve one small area of an experience this can be a great place to start. (The peak-end rule from chapter 7 can help you prioritize too.)
- ★ **The benefit:** Great customer experiences leave nothing to chance. This worksheet will help you break a stage of the customer journey down into smaller tasks so that you can identify opportunities to improve your offering. It doesn't matter if customers don't perform tasks in a fixed order, just get them all down on the page, and keep coming back to this every time you notice a new one. Complete one of these worksheets for each stage of the experience. Try taking this sheet with you on a clipboard when you do research.
- ✓ **You've got it right when:** You have identified all of the smaller tasks within a given stage of the experience, the touchpoints the customer can use to do them (e.g. cellphone, website, shop, call center etc.) and which of the ten principles are key to improving each task.

AUTHOR: _____ **DATE:** _____ **PROJECT:** _____

CUSTOMER(S): _____ **STAGE NAME:** _____

Customer's objectives for this stage
These are their success criteria

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Business objectives for this stage
These are your success criteria

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Pre-conditions What must the customer have done before they can start and successfully complete this stage?

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Steps required to complete this stage	Touchpoint	Key principles See icons below
e.g. Google "cheap flights"	Search engine	Effort
View flight options	Travel comparison sitet	Effort
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Reflects
customer's
identity



Satisfies
objectives



Meets
expectations



Effortless



Stress-free



Sensory
pleasure



Social pleasure



Customer in
control



Considers the
emotions

➔ **What next?** We prefer to work on one stage of the experience at a time, so once we've broken this down we get to analyzing it using the principles, starting with the key ones we've identified. We usually start with **Are you meeting expectations?** or **Can you make it effortless?** since these apply to almost everything.