



Reimagining Your Customer and User Journeys

10 ESSENTIAL TOOLS



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Introduction

Creating experiences that put customers and users first is paramount for today's businesses.

By placing the user at the heart of our product and service development, we can grow customer satisfaction, loyalty, and long-term business success.

While every business wants to meet user needs, it's easier said than done. One problem is not knowing exactly what people want. Even when you know how to please users, other challenges—like organizational silos and prioritization struggles—can stand in your way. If your individual departments [or their technology and data systems] don't work well together or share information, it's hard to create a seamless experience.

On top of this, some companies are afraid to change or try new things. They've been burned before and aren't ready to invest in something without knowing the payoff. But customers and users don't care about our internal issues or fears; they just want a smooth experience.



To overcome these challenges, businesses need to get to know their users deeply. They should encourage creativity and teamwork by aligning around a shared vision and plan based on proven user needs. By taking small steps rather than big leaps, they can minimize risk as they learn and improve over time. When you do all these things, you build stronger connections with customers and users and provide solutions they'll love, helping your business thrive.



Tools for Exploration & Discovery

Creating a better user experience starts with uncovering and examining the problems your users face today. Generative research, personas, and user journeys will help you achieve these goals.

You need these tools if your organization:

Is unsure what customers think of your products or services

Approaches customer needs based on how each business unit engages with them

Suspects doing business with you is hard for your customers, but doesn't know why or where to start

Has observed symptoms of business problems, but the root causes are unclear

Wants to build a new product, but is unsure what uses or features are important

1: Generative Research

Generative research draws on methods like focus groups, one-on-one interviews, and contextual inquiry (when you observe and interview a person in their everyday setting). No matter the tactic, generative research unearths critical insights about user behavior, motivation, standard processes, and environmental and social influences.



The end goal is a deep understanding of user needs and the context in which they make decisions. You want to know what the user does and the why behind it. This research offers a foundation for making meaningful improvements to your user experience.



2: Personas

Personas are fictional, highly detailed, and empathetic representations of typical users or customers that incorporate the insights gained from your research. They create a shared understanding of user motivations, goals, roles, frequent tasks, psychographics, environmental factors, and other relevant information.

By giving abstract user groups a face, name, and story, personas make it easier for teams to relate to and empathize with their users. Personas act as a compass, helping product owners, designers, and developers gut-check ideas and decisions against a realistic proxy for the end-user.

3: User Journeys

User journeys depict the pathways that users take to achieve specific goals. Each user journey focuses on a particular persona and process flow, documenting the objectives, activities, tools used, and pain points that arise.

Mapping these user journeys allows us to analyze areas of opportunity and the context in which they surface. This gives us insights for designing new digital experiences that solve real problems and deliver increased value to users.





Tools for Ideation & Product Planning

Following exploration and discovery is ideation and planning. As you seek to craft experiences that solve real customer needs, you should continue to reference your generative research findings, personas, and user journeys. As you work to clarify your ideas, gain leadership support and investment, and align on prioritization, vision one-sheets, roadmaps, and illustrative design concepts will also be powerful assets.

These tools will help you if your organization:

Needs help reimagining a new journey-centered experience that cuts across company silos to address customer needs

Struggles to make critical decisions because of differing opinions on priorities

Has tons of ideas, but doesn't know where to start or how to sequence them

Needs help communicating your vision, story, and ROI to unlock funding

4: Experience Maps

Experience maps are similar to user journey maps, but rather than focusing on a particular persona or goal, they show a broader view of users' complete experience with your organization.



For each stage of the overall user journey, experience maps articulate business objectives, moments that matter, user needs and motivations, and the channels of interaction. These maps help you see how everything works together—and where more value could be added for the business and the user.

Having a better handle on where, why, and how users interact with your organization will help you uncover and prioritize opportunities to unify the overall experience.



5: Vision One-Sheet

Establishing a clear understanding of a problem’s solution space and rallying around a single vision is foundational to building a great user experience. Aligning internal stakeholders generally requires a series of meetings and workshops for uniting on things like experience objectives, business requirements, use cases, and success criteria.

The result is a one-sheet that concisely outlines the team’s strategic vision—defining your shared priorities, opportunities for differentiation, and the specific problems you will solve at the intersection of human need and technology. Creating that document requires achieving a fully aligned team, something that can generate even more impact than the one-sheet itself.

6: Illustrative Design Concepts


Illustrative design concepts provide a peek into the future vision of how customers could engage with your products and organization. These visuals bring clarity and depth to new or complex ideas.

They are essential for gathering stakeholder consensus and also offer a starting point for the design and development process. After exploring and vetting multiple design concepts, you can determine which ones are most worth pursuing.



7: Program and Product Roadmaps

Program-level roadmaps prioritize your high-level initiatives and underlying tactics into a plan for delivering on your digital ecosystem vision. You can use these roadmaps to present an overall program and project landscape to stakeholders.



You can use these roadmaps to present an overall project landscape and program options to stakeholders.

A product roadmap is a level down, sequencing and summarizing an individual product rollout over time. It aligns business objectives and strategy to the epics and features that impact them. These features are prioritized and organized into iterative releases that create cumulative ROI and business value.

Both types of roadmaps help you align project scope to time and budget. The process of creating a roadmap also enables you to identify and address technology and organizational gaps.



Tools for Testing & Learning

Once you know your plan and priorities, it's time to put your ideas to the test. Experimenting early and often will reduce business risk and reveal the best path to delighting your users. You'll need to start by defining your top risks and concerns. You can then conduct experiments that guide you in iterating on your ideas and mitigating those risks. Before beginning development on any project, you should utilize de-risking tools like hypothesis workshops, technical experiments, and usability testing.

These tools will help you if your organization:

Only pursues low-risk enhancements, leaving innovative ideas languishing in the backlog

Won't invest in R&D if it doesn't produce software on the other side

Places large bets on a few ideas, but the real ROI is only apparent after the launch

Relegates innovation to a specific team rather than incorporating it across the business

Avoids innovation due to concerns about tech debt



8: Hypothesis Development Workshops

The first step in de-risking is identifying the product or feature risks. This requires stakeholders from different teams to work together to clarify the core idea, identify hidden assumptions, and prioritize based on risk and impact.

Once these steps are complete, you can develop an experiment plan. This plan should provide the quickest path to learn what is required to de-risk the product's development.

9: Technical Experiments

Some product ideas or features are too complex to put into a two-week development sprint. These ideas are often the most unusual, least proven, and riskiest—and are the innovations that will competitively differentiate your product.



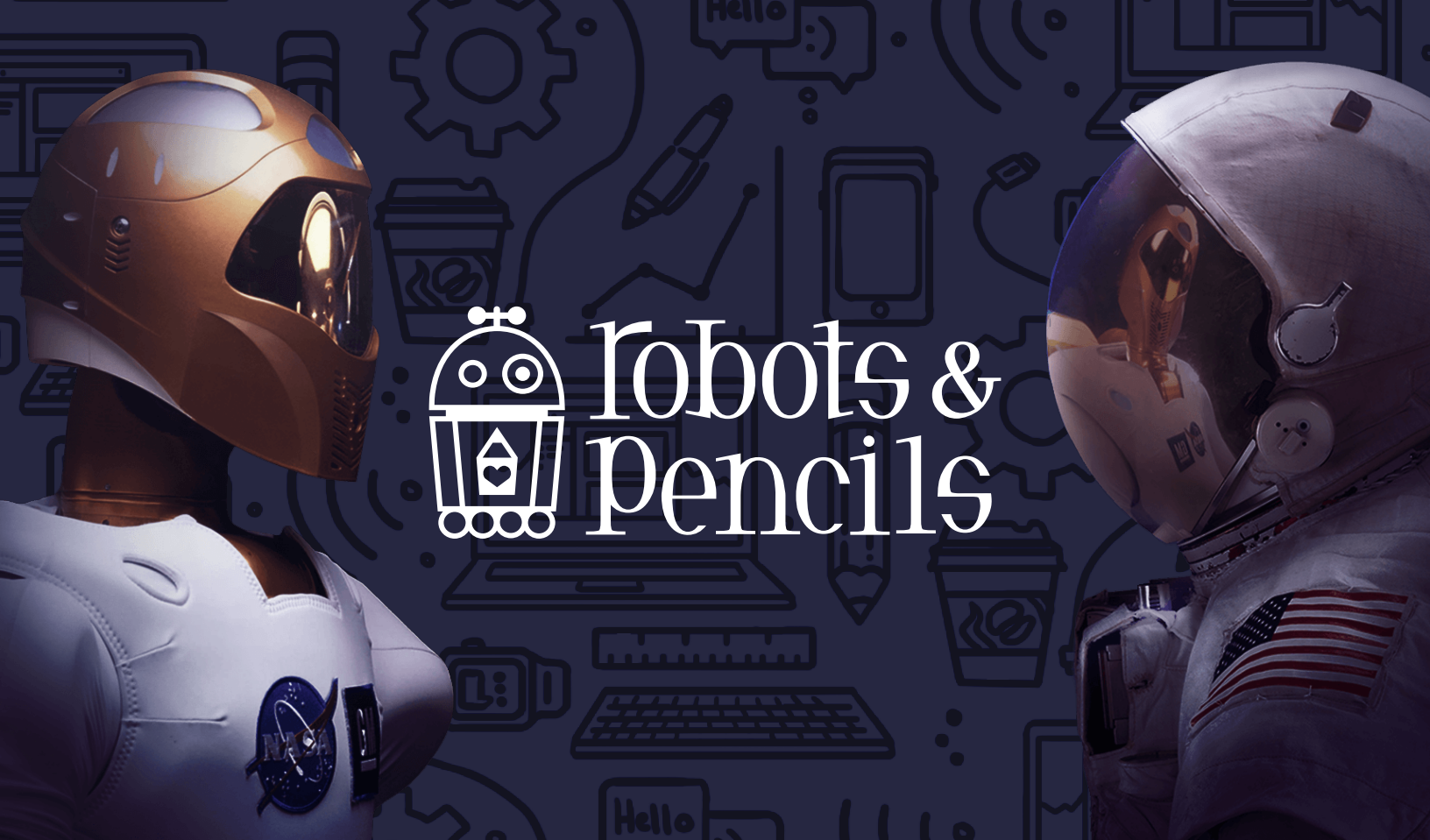
But they often require new APIs, data integrations, and architecture changes. Before you invest significant time or money, you need to know what it will take to make your idea reality. You have to prove that your solution is possible—or determine what changes would be needed to the current infrastructure for execution. Technical experiments systematically identify and break down the riskiest assumptions and generate the knowledge necessary to progress into agile development.

10: Usability Testing

Usability testing evaluates product interfaces with real users to gather feedback on the design, typically through one-on-one sessions facilitated in-person or remotely. These sessions help validate the utility of the product concept and identify usability challenges early in the process to avoid expensive rework down the road.

Usability tests can leverage anything from static or interactive UI wireframes with minimal content to more polished high-fidelity designs. Best practice involves testing at various stages, with the fidelity of the prototype increasing as user feedback helps you iterate and improve.





About **Robots & Pencils**

Robots & Pencils develops journey-focused digital products and experiences that deliver exponential impact for our clients. We design and build solutions that unlock data and insights, infuse intelligent automation, and accelerate organizational innovation. Fusing technology + creativity, we help brands transform their businesses, deliver delightful customer and employee experiences, and maintain a competitive edge amidst a constantly changing technology landscape.

To learn more about our work and how we can help you de-risk your next innovation project, visit robotsandpencils.com