



GROWING TOGETHER IN THE AMERICAS

DIGITALISATION FOR INTERNATIONAL TRADE
CHALLENGE



Agenda

1. **Important announcements**
2. Individual challenge
3. Customer journey
4. Design Thinking
5. Group challenge
6. Q&A



Attention!

1. Take advantage of the **Q&A session** to ask questions that enrich the class. These will be posted in the forum during the course of the week.
2. The study material will be published in the Academy every Friday.
3. The **chat** is intended for comments you want to share. Remember we are reading you!
4. Post in the class forum on **ConnectAmericas Academy** for further questions, suggestions and comments related to the class. This way, your classmates will also be able to discuss them.
5. This is a learning environment, we come here to learn, to make mistakes, to reflect, to change our minds, **and it's all good!**
6. If you have any problems, please contact us at: creciendojuntas@connectamericas.com

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Congratulations to the participants who completed our first individual challenge!



You will have the opportunity to participate in our first **masterclasses in April**. You will receive more information soon.

Remember that these challenges are worth **30% of the topic grade** and are key to **successful business transformation**.

Santiago Peña

Business Design and UX Manager – EY Design Studio LAN

Santiago works in the area of strategy and innovation consulting. He is an innovation designer and holds a Master in Business Design from the Domus Academy in Milan. His focus is on using tools and skills in the creative process to generate new ideas, products and services that generate true innovation.

She has 10 years of experience and has been fortunate to work in various fields and with various clients such as: Procter and Gamble, Abbvie, Nestlé, Dicorp, Equion, Diageo, DLK Group.

For more than 7 years he has been interested in demonstrating how design thinking is an indispensable tool for the challenges of the future.



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You can't **transform** something you don't understand. If you don't know and understand what the **current state of the customer is**, how can you possibly design the desired future state?

Annette Franz

Founder and CEO of CX Journey Inc.

Customer Journey Map



CUSTOMER'S DESCRIPTION

- Demographic, social, and family data
- Relationship with the service or product
- Objectives

STAGES Described by the customer				
Needs Of the customer in each stage				
ACTIVITIES Performed by the customer to satisfy needs				
CHANNELS, TOUCHPOINTS				
EXPECTATION Of the customer in each stage				
EXPERIENCE Customer's perception positive, negative or neutral				
MEMORABLE EXPERIENCE Perfect experience				
OPPORTUNITIES FOR IMPROVEMENT Derived from the analysis				

Key elements of customer journey

Persona

They are fictional characters that represent key customer segments. They drive an effective and targeted conversation by exposing a deeper insight into customer needs and impacts.



“The best personas not only describe users, but help designers predict their behaviour. Obviously, for personas to facilitate such predictions, they must be based on much more than intuition and anecdotes.” (Hari Nallan & Mohita Jaiswal)

Utilisation

It should be used if ...

- The company is entering a new market space.
- Customer centricity needs to be reinforced.
- The company has many key stakeholders

Insights

The keys to success are ...

- To have personas, current and future, based on data.
- Avoid underdeveloping personas
- Allowing persona’s perspectives to drive the conversation
- Crafting personas to serve specific purposes

Key elements of customer journey

The customer journey is a discovery process to understand how customers interact with the company. This design process is data-driven and visualised to gain insight into the customer process, key touch points and friction points.

Utilidad

It should be used if ...

- The project has UX/UI elements
- There is a gap in the expectations of the journey and reality
- There is a high level of complexity in the purchase or customer relationship process

Insights

The keys to success are ...

- To have a 360° view of people and their actions.
- Highlighting successes and sticking points
- Incorporate metrics at all points in the journey and the discussion
- Don't be too broad in the scope of the journey

Points of contact

Identify the touch points through which your customers interact with your company. Quickly research which channels your customers use most and how they contact your company. You can do this by looking for mentions of your brand online and checking where traffic to your website is coming from.

Key elements of customer journey

Activities or actions

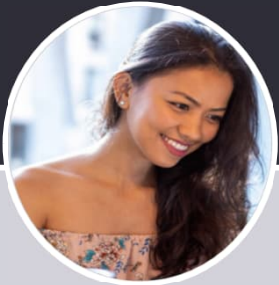
Identify the actions your customers take to interact with your brand and check whether they take the expected number of actions. If the answer is no, you should investigate what may be discouraging the customer from taking action.

Points of friction

Every consumer action is motivated by an emotion. And the emotion is usually triggered by a problem or a pain. Therefore, we must understand what pains our customers have so that we can trigger an emotion in them at each stage of the customer journey map. In this way, it will be possible to produce the right content at the right time, motivating the customer to act and make decisions.



Customer Journey Example– *Buying a car*



Melina

Female
35 years
Curitiba, Brasil
Married
2 kids
Doesn't know the brand

Quote: “There's nothing like a fast and accurate service.”

Scenario: Melina just moved to the city, she's looking for a spacious car.
It's the first car she buys.

STAGES

NEEDS

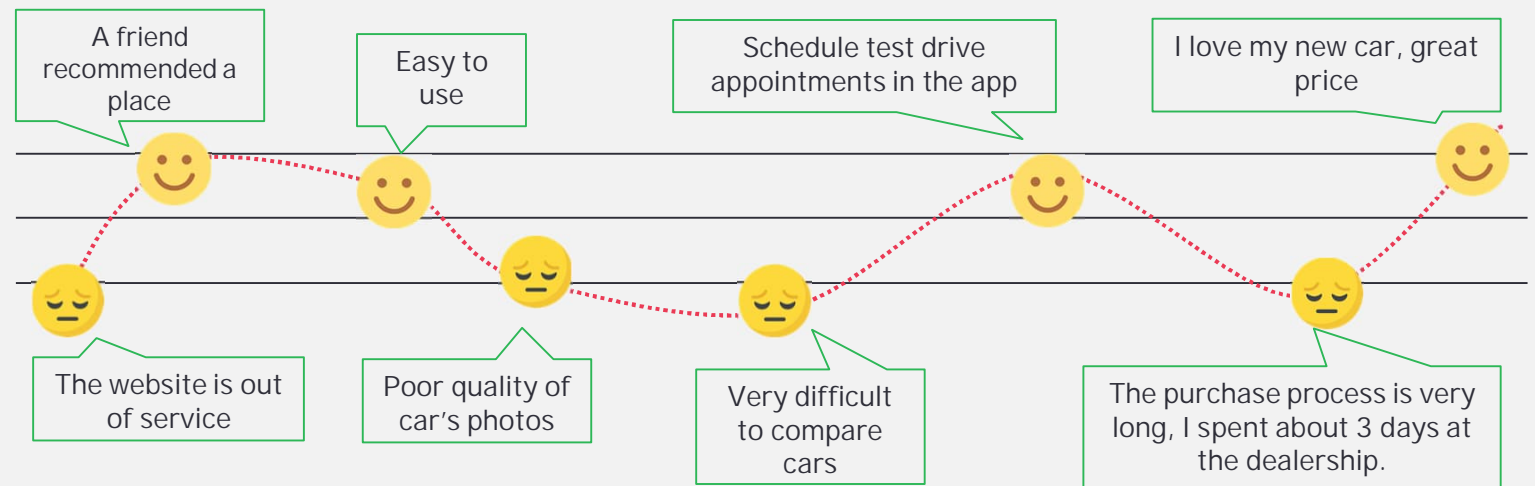
ACTIVITIES

CHANNELS, TOUCHPOINTS

EXPERIENCE

Customer's perception positive, negative or neutral

STAGES	CONSIDER	EXPLORE	COMPARE	TEST	NEGOTIATE
NEEDS	Finding online options for buying a car	Find cars that she likes and are within her budget.	Have feedback from real customers	To be able to test the cars quickly	Complete the purchasing process online
ACTIVITIES	See advertisements promoting website for buying cars Ask friends for recommendations	Explore website Create website account Add cars to your wish list Download app	Read customer reviews Consult with people she trusts Check the website to find cars that fit her criteria	Select a number of cars to test Find dealer locations Visit dealership, discuss process with salesperson Repeat process for each car	Deciding which car to buy considering the price
CHANNELS, TOUCHPOINTS	Facebook, Television	Website, app	Website	Google maps, car dealership, app	Car dealership

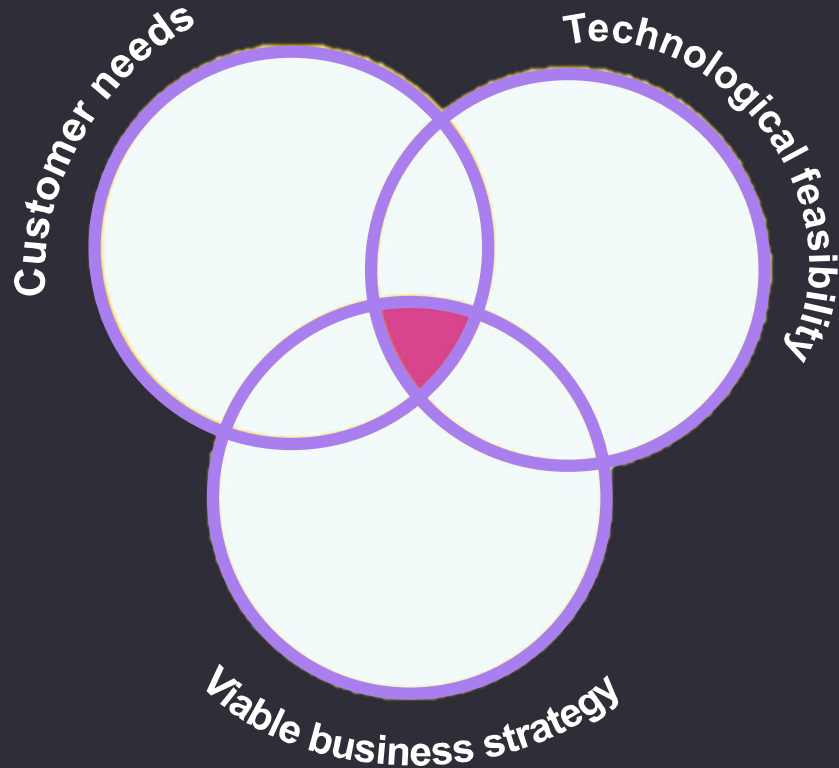


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Design Thinking (DT)



- ▶ Design thinking is generally defined as a creative and analytical process that involves a person in opportunities to experiment, create and prototype models, gather feedback, and redesign.
- ▶ It is a method for generating innovative ideas that focuses its effectiveness on understanding and solving real user needs.

The 5 stages of design thinking



EMPATHIZE

- ▶ Study the customer
- ▶ Put yourself in their shoes
- ▶ Understand their needs, frustrations, and motivations.



DEFINE

- ▶ Focus on the target group/areas to be served
- ▶ Identify opportunities to apply relevant design solutions
- ▶ Reframe the problem and use new perspectives



IDEATE

- ▶ Brainstorm and generate multiple possible solutions.
- ▶ Diverge, diverge, diverge before converging



PROTOTYPE

- ▶ Quickly represent the idea in the form of a draft, sketch or model
- ▶ Communicate/demonstrate it to others



TEST

- ▶ Gather feedback from end users
- ▶ Consider pros and cons
- ▶ Review and iterate

How to create **personas**?



EMPATHIZE

1

Persona preparation

Collect data and trends. Determine the current and future status of customers and market segments. List general purposes of people.

2

Session preparation

Much of the success is determined by the involvement of the company and its employees in building personas. Communicate expectations and the value of creating personas.

3

Goal-oriented personas

They focus on usability, workflows, UI/UX and all touchpoints of a “straight shot” to the goal.

4

Role based personas

These are goal-oriented personas who have a specific focus. For example, they might be a researcher who needs to find and recommend the best product to their manager.

5

Engaging personas

They are the most "complete". The goal of these personas is to understand the impact of background, context, situations, etc. on the user's actions and perception.

6

Fictional personas

They are personas created from the participants' understanding of what the user could be like. They will use their past experiences to craft these personas.

Persona example – Acquiring software



Kevin, IT specialist

Background

Kevin is an IT specialist with 10 years of experience. He is responsible for new software integrations into the existing technology ecosystem.

Goals

Obtain a product that is easy to integrate within the company's current IT structure and does not require too much support.

“Support and security”

Datos demográficos



Male

32 years

United States

IT specialist

High income

Medium company

Motivations

- Easy integration
- High security
- Experienced suppliers

Frustrations

- Software that requires constant support and maintenance
- Deficient relationship with suppliers (people who do not have all the technical information about the software).

How to map the customer journey?



EMPATHIZE

1

Understand the Customer

A 360 view of the customer persona and the decided journey needs to be understood. Data must be presented in an easily digestible format.

2

Outline the Stages

This occurs after having determined point A and point B to build the customer journey. With this decision, a high-level journey map is built to illustrate the major movements. It is important to focus on the customer's goal and not on business processes.

3

Define the Actions

The points of contact with the company are added. These should be as detailed as possible to understand what is necessary for a customer to reach their goal.

4

Understand Points of Friction

Here is where data is leveraged to the fullest to understand which actions are points of friction that slow down or discourage the process and which actions are points of positive impact.

5

Address Points of Friction

After understanding where the friction points are, ideas for solving them are brainstormed and planned. This is the point in the design process that produces the action plan for moving forward.

6

Measure

Include KPIs, customer journey objectives and milestones, and opportunities for improvement. In addition, if a lack of data was discovered in the process, the possible solution should also be discussed here.

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It's time to work together!

GROUP CHALLENGE “CUSTOMER JOURNEY”



In groups of 6 people you will have to develop a customer journey for one of the businesses in the group.

Date of submission: [Monday, April 18](#)

[Check the ConnectAmericas Academy for detailed instructions.](#)

Q & A



Thanks!

See you next Tuesday



Please go to the following link and give us your feedback on today's class:

<https://forms.office.com/r/QuCqUT4i8N>

Your opinion is very important to us.