



## Customer Journey Map

**Vincent Flanders**  
**Fledgling value investor**

- Accountant
- 45-year-old male
- Married, 3 children

Vincent wants to try his hand at *value investing*, having been introduced to the concept by his brother-in-law, and following up by watching several YouTube videos on the subject. He followed a YouTube link to Warren Buffett's *Berkshire Hathaway* website. Although he knows that Warren Buffett's site is reputable, he's having second thoughts based on the unprofessional appearance of the site. He would be much more comfortable following and taking Warren's recommendations if the site was more professional and polished.

[www.berkshirehathaway.com](http://www.berkshirehathaway.com)

### Goals

Easily find pertinent information about value investing on one organized and professionally designed and laid out site.

Use the site's improved navigation to find information for investors, letters from Warren Buffett, investment tips, annual reports and other content relevant to investors.

Sign up for an investment newsletter and tips from industry experts. Feel confident and comfortable using the site, knowing that it's secure, professional and well laid out.

Having a site that is standards compliant, designed properly and follows user experience and user interface design standards will make it a pleasure to recommend to friends, family and colleagues.

### Awareness

#### Browsing

#### Investment Decision

#### Payment

#### Anticipate

#### Satisfaction

##### Product Discovery

- Learns about value investing
- Hears about Warren Buffett's method by word of mouth
- Sees information about a project on social media/targeted ads
- Talks about investing with peers

##### Research

- Searches web for information about value investing and companies that provide investment services
- Watches YouTube videos on the topic
- Reviews investment companies on social media
- Compares companies regarding pricing, services, options offered, reliability and credibility
- Reads user reviews on businesses
- Reads fine print on investment policies, returns and refunds and any guarantees
- Finds Berkshire Hathaway site, confirms its association with Warren Buffet and chooses the site as a potential investment partner

##### Choosing a Stock or Company

- Reviews investment options, including different companies, stocks and prices
- Decides to purchase a stock recommended by his brother-in-law and confirmed as a good investment by his broker.

##### Processing

- Takes a chance and contacts broker
- Provides contact information
- Provides billing information
- Broker confirms and processes payment via debit, credit card or another valid payment option

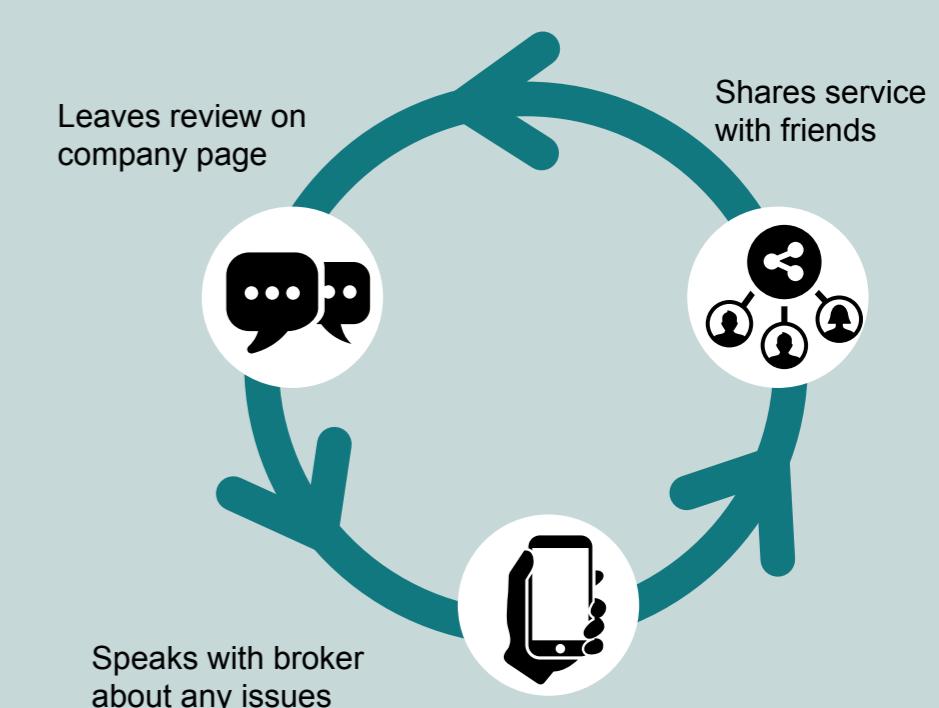
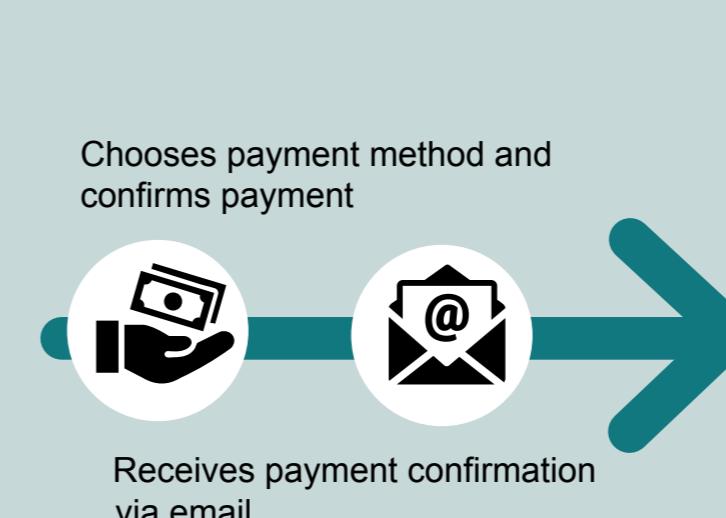
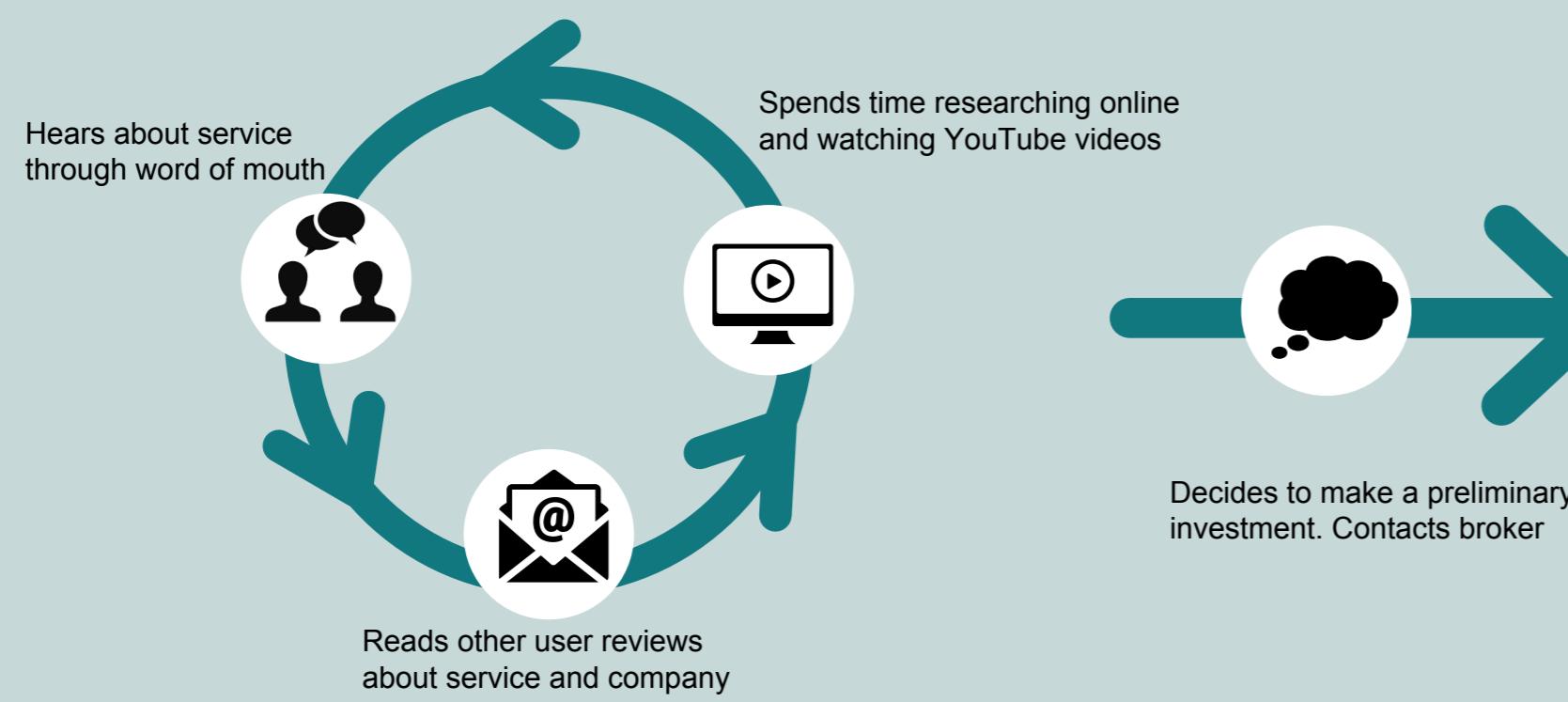
##### Hopes he made correct choice

- Receives order confirmation email
- Anticipates regular updates via tips and newsletter emails
- Shares experience on Twitter, Instagram and Facebook to attract and encourage other potential investors

##### Sighs in relief and celebrates

- Leaves a review of the experience with company and on social media.
- Realizes his investment went off without a hitch and celebrates his success
- Shares experience and/or website link on social media

### Actions



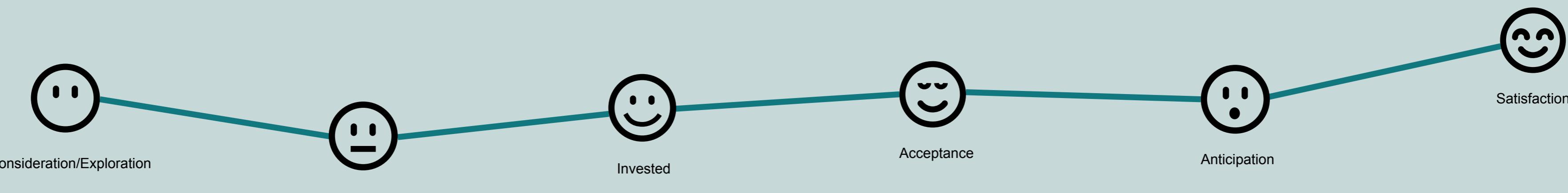
### Process and Channels

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| <ul style="list-style-type: none"> <li>• How do I access this service?</li> <li>• Can I make purchases directly through the website?</li> <li>• Is the website reliable/reputable?</li> <li>• Are there sites and services similar to this one? Who is the competition?</li> </ul> | <ul style="list-style-type: none"> <li>• What is the average cost of a value investment transaction?</li> <li>• Is value investing worthwhile?</li> <li>• What are other value investors saying about this website?</li> <li>• How long will it take to purchase and receive my shares?</li> <li>• Can I cancel a purchase?</li> <li>• Are the available brokers reputable?</li> </ul> | <ul style="list-style-type: none"> <li>• What if I'm unhappy with the stock I purchased?</li> <li>• Can I get a refund on my purchase?</li> <li>• How do I decide which company or stock is right for me?</li> <li>• How do I know which stock(s) to buy and when the best time is to buy?</li> </ul> | <ul style="list-style-type: none"> <li>• Can I trust this website or broker?</li> <li>• Will this website be able to offer support if I need assistance?</li> <li>• Are brokerage fees included in a purchase or are they an added expense?</li> <li>• What happens if I'm dissatisfied with my purchase or the stock isn't performing well?</li> <li>• What happens if I don't receive my stock(s) or a purchase confirmation?</li> </ul> | <ul style="list-style-type: none"> <li>• How often will I receive the site's newsletter or investment tips?</li> <li>• How do I contact customer support if I run into any issues or have questions?</li> <li>• I'm a little wary of making purchases online/through a website. Can I deal with a broker directly? If I can't deal directly with a broker, how can I be sure my transaction is secure and my credit card information won't fall into the wrong hands?</li> </ul> | <ul style="list-style-type: none"> <li>• Vincent makes his investment choice and his payment is processed and is satisfied with every step of the process.</li> <li>• He wants to tell his friends about value investing in case it's of interest to them</li> <li>• He shares his thoughts (positive and negative) about his investment/experience on the site's feedback page and social media so that other potential investors know what to expect from this company</li> </ul> |
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### Thoughts & Expectations

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| <ul style="list-style-type: none"> <li>• The website is very dated in appearance and does not follow traditional web design rules, such as link and text colours. Unvisited links are purple and visited links are red.</li> <li>• The company has very little social media presence. For example, no official Twitter account or Facebook page.</li> <li>• Many of the links lead to PDF files instead of HTML pages.</li> <li>• The only way of contacting the company is by writing a letter and mailing it to a physical address.</li> <li>• User would be more comfortable if the site was professionally designed and laid out.</li> <li>• The site is currently "just one big page". If there was a consistent navigation system throughout the site it would be much more comfortable and easy to navigate.</li> <li>• More up-to-date content and a greater presence from Warren Buffett via news letters and updates would increase the confidence of site visitors.</li> </ul> |
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### Feelings & Experiences



### Pain Points

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| <ul style="list-style-type: none"> <li>• Redesign website for appearance and usability.</li> <li>• Rework website content to improve traffic and SEO.</li> <li>• Reorganize content and improve presentation of information. Introduce a user-friendly navigation system that is consistent throughout the site.</li> <li>• Present information in a clear and easy to understand format.</li> <li>• Provide an <i>About</i> page to make it easier for investors to find out about value investing and Warren Buffett.</li> <li>• Provide a list of affiliated brokers in case clients don't already know or have access to a broker.</li> <li>• Ensure it's possible for clients to contact customer support and that support communicates changes, updates and news on a regular basis.</li> <li>• Offer free tips and advice on investing and provide free access to a broker.</li> </ul> |
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### Ideas & Opportunities