

Gender inclusive customer journey worksheet

How to map customer interactions and experiences

This gender-inclusive customer journey map will enable you to identify and visualize what a persona's experience is with your product, service or brand at various touch points from a gender inclusion perspective, so that you can highlight any missing gaps for which you can design interventions and enhance your product.

Directions to use the gender inclusive customer journey worksheet:

1. Before using this tool, it is recommended that you outline your customer persona. You can refer to the customer segmentations tools ([access here](#)) to understand common personas or create your own customer segmentations.
2. Define the key stages of interaction with your product and service for the given persona.
3. Go through the sample worksheet and prompts in the context of a hypothetical example for better understanding.
4. Fill up the customer journey worksheet based on discussion with relevant teams.
5. Journey maps can have various use cases as shown below. Users should identify upfront why they want to create one and how will they use it.
 - a. **Customer experience evaluation use case** - use journeys to understand experiences of various segments with your product or service and use that to enhance offerings
 - b. **Product innovation use case** - use journeys to understand how customer segments would interact with a new product / innovative feature
 - c. **Internal communication and awareness use case** - use journeys to communicate customer experiences and pain points internally within the organization
6. At the end of the tool we have provided a glossary of some commonly used terms which will aid in better understanding of some of the language.



Primary audience
Gender transformative



Tool type
Worksheet



Personnel
Sales teams, field agents,
product development teams



Duration
6-8 hours

GOALS

(1) Understand how to evaluate interactions of various customer segments with your product or service.

REQUIREMENTS

(1) Utilizing this tool will require availability of information on customers.

(2) Availability of in-house user research expertise would be beneficial or can be contracted.

(3) Availability of a gender advisor or expert will be beneficial.

(4) If there are terms which are unclear we suggest referring to [Gender concepts glossary](#) tool or consult your Gender Advisor if you have one.

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GENDER INCLUSIVE CUSTOMER JOURNEY WORKSHEET WITH PROMPTS

Go through the below template to familiarize yourself with the various stages of a customer journey and refer to the specific prompts under each section which will help you apply a gender lens. You can modify these stages as per your needs.



PERSONA NAME: _____
(Use a persona you have identified from research)



JOURNEY NAME _____
(Define the journey you want to improve)



List all stages chronologically from awareness to repeat use

Customer finds out about the product / service

Customer assesses whether to use the product / service or not

Customer uses the product or service

Customer is a repeat user

Customer encourages others to use the product / service

Touchpoint

Describe the actions your persona takes at each stage to interact with your product
 ★ What activities does the woman need to undertake to interact with your product or service?
 ★ What are the social norms or gender norms that impact various touchpoints?

Product experience

What feelings to these actions evoke in the persona? (Use one of these emojis to describe feelings) 😊 😐 😞

Key features

Define the main product features the persona interacts with across stages
 ★ Which features do women enjoy & use comfortably?
 ★ Which features frustrate women?

Channels

What channels does the persona use to access the product or service
 ★ Which channels do women use more and which do they prefer? Why?
 ★ Which are a barrier to access and continued use?

Pain points

Describe the problems they run into as they use the product or service
 ★ What barriers do women face as they interact with your product?
 ★ What social norms and barriers do women face as they interact with your product?
 ★ Do women have misconceptions about your product or service? Why?

Opportunity

How can you address these pain points
 ★ What interventions can be designed to address this woman's pain points?
 ★ What new features, messages, products and services can be introduced to address pain points?
 ★ Are there opportunities to address barriers from social norms?

★ Prompts to help you apply a gender lens during this exercise

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GENDER INCLUSIVE CUSTOMER JOURNEY WORKSHEET WITH EXAMPLE

Refer to the hypothetical example of a customer journey map created by a Kenyan digital financial service provider for the customer experience use case to enhance product features. Based on the customer journey insights, the provider can enhance some product features (such as flexible repayment options) and marketing channels so cater to mobility barriers that women face.



PERSONA NAME: Careful striver
(Use a persona you have identified from research)



JOURNEY NAME Input loan application & use
(Define the journey you want to improve)

Stages	Awareness	Evaluation	Acquisition	Retention	Advocacy
List all stages chronologically from awareness to repeat use	Customer finds out about the product / service	Customer assesses whether to use the product / service or not	Customer uses the product or service	Customer is a repeat user	Customer encourages others to use the product / service
Touchpoint	Hears about the product from other farmer friends	Gathers additional information, consults spouse	Uses product after training with field agents	Uses product so next season after talking to agent	Tells friends to apply for the loan
Product experience	😊	😐	😞	😊	😊
Key features		Apply using the USSD app	Are able to service the loan on the USSD app		
Channels		Prefer talking to agents in-person for application	Prefer using mobile based servicing for convenience		
Pain points	Cannot attend activation drives on market days as they are far away	Do not fully understand all the terms of the loan		Other competing expenses lead to late payments, inability to get more loans	
Opportunity	Conduct activation drives closer to where women can attend	Recruit field agents for in-person explanation of products		Offer flexible repayment options	

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GENDER INCLUSIVE CUSTOMER JOURNEY WORKSHEET BLANK TEMPLATE

Based on your understanding of the customer profile and use case, fill up the below journey map worksheet.



PERSONA NAME: _____
(Use a persona you have identified from research)



JOURNEY NAME _____
(Define the journey you want to improve)

Stages	Awareness	Evaluation	Acquisition	Retention	Advocacy
List all stages chronologically from awareness to repeat use	Customer finds out about the product / service	Customer assesses whether to use the product / service or not	Customer uses the product or service	Customer is a repeat user	Customer encourages others to use the product / service
Touchpoint					
Product experience					
Key features					
Channels					
Pain points					
Opportunity					

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RELEVANT GLOSSARY

As you work through this tool, you may have come across terms that are unfamiliar or confusing. Below is a list of some terms, knowing which would aid in better understanding of the tool. If there still are terms that you do not understand, it is recommended to refer to the [Gender Glossary](#) and other linked sources or consult with your Gender Advisor (if your organization has one).

Gender analysis refers to the critical examination of the differences between men and women, boys and girls, in their access to and control of resources, their roles and responsibilities, and the constraints they face in a given situation or context relative to each other. For instance, an assessment of the differences in access to and control of digital agricultural solutions between women and men smallholder farmers.

Gender based constraints refer to formal laws, attitudes, perceptions, values, or practices that limit people's access to resources and/or opportunities based on their sex or gender identity. For instance, cultural norms that limit women's ownership of agricultural land are gender-based constraints.

Gender bias refers to the conscious or unconscious, explicit or implicit prejudiced actions or thoughts that could lead to unfair treatment of people based on their perceived gender. For instance, male farm laborers hired by women farm owners are likely to be less hardworking and reliable due to the lower perceived strictness of women.

Gender lens refers to a perspective that aims to identify and understand gendered power differences and biases among different groups in economic, social and legal contexts by analysing the relationship between different gendered groups, their access to resources and opportunities, and the constraints they face relative to each other.

Gender roles refer to socially determined behaviours, tasks, and responsibilities assigned to different individuals based on perceived differences in their sex. These are socially-prescribed norms on how people should think, act, speak, and feel based on their perceived sex. For instance men farmers going to the market to sell produce even if women farmers worked on the fields based on men's role to handle money.

Gender/ social norms collectively held standards to which people are expected to conform at different stages of their lives based on their sex or gender identity. These are norms that seek to represent beliefs and values of what it means to male or female in different societal contexts. For instance gendered expectations for women to engage in unpaid caregiving work limits their time to engage in productive agricultural activities.