HI THERE!

This guide introduces you to customer experience research and how to use ExperienceFellow to research your customer’s journey through mobile ethnography.

Comments, feedback, ideas? Drop us a line!

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This is ExperienceFellow:

GETTING TO KNOW THE PARTS OF OUR MOBILE ETHNOGRAPHY SOFTWARE

Researchers (you) create the project and configure the mobile app according to the project’s focus.

Participants (the customers) report their experiences with the exp.fellow mobile app.

Researchers use the ExperienceFellow web-based app to analyze experiences reported by the participants.

Touchpoints consist of a descriptive text, emotional value, images, videos and location.

The reported experiences can be visualized, analyzed, tagged, filtered, and exported.

Researchers invite participants to the project in order for them to report their experiences.
HOW TO USE EXPERIENCEFELLOW

The following pages show you how to conduct your own project with ExperienceFellow.

PROJECT SETUP

The setup of your project will influence the data you collect. Clarity of what you want to achieve from the start will help focus your research.

Is your project rooted in a specific question? Do you want to improve a specific phase of your offering, or in a specific geographic area? Are you interested in a specific age group? Do you need information on the customer's perception, or are you more interested in their expectations?

You can set up the invitation and instructions according to the project’s focus.

ExperienceFellow offers plenty of options to adjust the project to your research requirements, such as the customization of the participants’ profile.
PROJECT STAGES

Once you finish setting up the project, you are able to change the details of your project, and the settings for the mobile application until you start collecting data by inviting participants to your project.

Afterwards, the settings are locked in order to guarantee that all your participants have the same set-up in their mobile applications.

As soon as you receive data from your participants you can analyze it. Keep in mind that your dataset is still subject to change as participants can add or change their data until you stop collecting data.

If you are done with your research but would like to keep your project for later, you can archive it.
HOW TO USE EXPERIENCEFELLOW / DASHBOARD

On your dashboard you get a quick overview of your current projects and their data collection status: if they are collecting data, have stopped or if a project still needs to be set up.

You may also see notifications about your ExperienceFellow account on your dashboard, such as messages from our billing system or announcements of new features.
You can create as many projects as you want. Maybe you want to conduct two different projects, one for your customers and one for your employees?

1. **Organization Info**
   Shows you all your account settings, billing information, invoices, etc.

2. **Create a Project**
   You can kick-start a project right from your dashboard.

3. **Project Status**
   See the status of the project at a glance, without needing to go into it to check it.

4. **Project Details**
   Toggle a project to see its description and which researchers can work on it.
HOW TO USE EXPERIENCEFELLOW / THE SETUP WIZARD

Guides you through the setup process of your project.

The wizard helps you to set up your project according to your own needs. It guides you through the setup so you can be sure you did not forget anything.

Your project was successfully created!
GENERAL INFORMATION

A  SET THE PROJECT TITLE
Add a title for your project. The project title is also visible for your participants. Choose a short and clear title to easily identify your project.

B  WRITE A PROJECT DESCRIPTION
The description is only visible for the researchers. This is to remind you of the focus of each project if you conduct more of them at the same time.

C  WORK WITH DEFAULTS OR CUSTOMIZE EVERYTHING
Kick-start with predefined options to create your project (recommended for beginners), or define the details on your own (recommended for advanced users).

D  CUSTOMIZE LEGAL TERMS
In case your project needs to be backed by special legal terms you can add those here.

E  SELECT ORGANIZATIONS
Researchers can be enrolled in two or more organizations, e.g. if they offer consulting to two different companies. If you are enrolled in two or more organizations, you can choose the organization for this project here. You can switch between your organizations directly in the browser-based app.

F  ADD RESEARCHERS
Invite other researchers to work on the data together with you to get an even deeper understanding.
CUSTOM LEGAL TERMS

In case your project needs to be backed by special legal terms you can add those here. For example, if you want participants to agree to share specific data (e.g. pictures, videos or GPS) or if you simply want to create a disclaimer about how the collected data will be processed.

**Important:** This feature does not work with smartphone app versions older than 1.4 (iOS) and 1.2 (Android). Participants with older versions won’t be prompted for accepting your customized legal terms. But no worries: participant profiles show exactly if someone accepted legal terms or not.
PRIMAR CONTACT

It’s important for your participants to have a person they can get in touch with in case of questions.

This is the contact info, consisting of company and contact person details. Your participants see this information in the mobile app.

![Contact Info Form](image-url)

**COMPANY DETAILS**

- **Company name**: My Company
- **Address**: 123 My Street
- **Postal code**: 6020
- **City**: Innsbruck
- **Country**: Austria

**CONTACT PERSON DETAILS**

- **Full name**: Peter Doe
- **Email address**: peter@example.com
- **Confirm email address**: peter@example.com

This is the contact info for your project your participants see in the mobile app. Please enter a valid contact here so that participants can get in touch with a responsible person.
The ExperienceFellow project setup offers many customization options.

There is no “one size fits all” solution to a project setup. The right setup depends on your case.

We have created customization options so you can choose things like:

▶ the wording you want to use so your participants understand the focus of your project in your terms.
▶ specific information about your participants (email, gender, age, etc.).
▶ the type of data you want to collect (such as pictures, video, GPS, etc.).

Can I have my logo positioned in the mobile app?

Currently there is no standard option to upload your own logo. That is possible only for individual white label solutions. Please get in touch if you are interested in having a white label for your company.
A WELCOME SCREEN
This screen defines what your customers see on their mobile screen when entering the Experience Fellow project. Use it to describe your project and to give clear instructions on what your customer should document.

B LOCATION HANDLING
Choose if you want to track GPS data. Remember that projects that take place outside can capture GPS data but projects that take place inside cannot.

C MEDIA TYPES
Pictures and videos will help you interpret touchpoints. You can see what your participants saw and hear what they heard. This can help expand on the text or descriptions they share.

D NAMING TOUCHPOINTS
Choose a term that your participants can identify with. Touchpoints? Experiences? Moments?

E SCALE TYPE
Decide how you want your participants to evaluate their experience. Is it based on: satisfaction, importance or experience?

If you would like to have another scale, or another wording for touchpoints/experiences/moments, let's talk about that – drop us a line!
HOW TO USE EXPERIENCEFELLOW / MOBILE APP SETTINGS

PARTICIPANTS PROFILE
Use this to learn more about your participants and to help group them into customer segments later.

PARTICIPANTS PROFILE SETTINGS
The participant profile is a short questionnaire to get more details about the participants in your project. Decide which personal information you need from your participants.
Try not to ask for more than you need here. Asking for data you don’t care about means additional work for you and your participants and might prevent them from continuing to sign up.

A  DEFAULT PROFILE FIELDS
Click all the default profile fields you need your user to share with you.

B  CUSTOM PROFILE FIELDS
Add further questions freely and choose your favorite answer category (text, yes/no, numeric, single choice).

The participant profile is a short questionnaire to get more details about the participants in your project. Decide which personal information you need from your participants. Choose default profile fields or create custom profile fields:

Text: Participants can enter text to answer your question (keep the question short).
Yes/No: Participants answer with a simple yes/no button.
Numeric: Participants can only add real numbers (no decimals).
Single choice: Participants can select one of the options you provide for this field.
HOW TO USE EXPERIENCEFELLOW / PROJECT OVERVIEW

Now that you’ve used the setup wizard, your project is created and you’re ready to go. In the project overview you have access to all sections and tools of your project. You can edit the project information, status, add and remove researchers.
NEXT STEP: COLLECT DATA
Your project is set up. Now it’s time to invite your participants and collect data.

During data collection you can already analyze the data, but your data set is still subject to change as participants can add or change their data until you stop collecting data.

1 Breadcrumb Navigation
Never get lost: the current project is shown here.

2 Quick Navigation Bar
Access all sections of the project. Use the quick access bar to search and go to participants and perspectives.

3 Project Overview
See the basic information on your project and manage researchers.

4 Project Status
See the status of your research project and switch to the next status.

5 Invite Participants
Get the QR code/token code and make use of a predefined invitation text.

6 Sync Details
See how many people registered and how many have synced their data.

7 Delete Project
You can delete your project if you don’t need it anymore. Make sure you’ve exported the data you need before deleting it!
ALL ABOUT PARTICIPANT RECRUITMENT

HOW DO I INVITE PARTICIPANTS?

Click on “Invite participants” on your dashboard to find the project’s unique code: one as a QR code and a token. This is what your participants need to join the project (by either using the QR code or the token) and to report their experiences.

All participants use the same token to sign into your project. You can copy and paste both the QR-code and token code and place them on your participation invitation, e.g. mailings, posters, flyers, etc.

Individual and personalized invitations work best. You’ll find a simple PDF and HTML template here that you can draw on to create your own.

WHEN SHOULD I INVITE MY PARTICIPANTS?

Participants have an extended experience with your service, which also includes the pre- and post-service period. For instance, you could invite your participants via email days before they arrive at your venue to find out how their arrival was.

Dear participant,

we would like to invite you to share your experiences with us regarding the project EF Guide.

The app ExperienceFellow enables you to document your individual experience with a brand, product, or service. Your feedback helps us to understand the real experience our customers have.

EF works like a diary on your smartphone. You can document and evaluate whatever you experience in short stories.

Get started
1. Download the mobile app "app.fellow" from the App Store or the Google Play Store.
2. Use the app to scan the attached QR code with your mobile device – or type in the project token manually.
3. Start reporting your experiences!

Individual and personalized invitations work best.
HOW CAN I MOTIVATE MY CUSTOMERS TO PARTICIPATE?

Reporting many experiences can be effortful for your participants. Providing them with an incentive can show how much you appreciate their effort. Giveaways, vouchers and raffles work very well as incentives. Also, offering customers updates on what you do with the data, e.g. how you improved the service, helps to increase motivation.

Visit our website for case studies on mobile ethnography projects to find out how other companies or organizations managed to get participants for their projects.

HOW MANY PARTICIPANTS SHOULD I INVITE?

This depends on your research approach. There are advantages and disadvantages to the number of participants you invite to a project.

Typically, you’ll face a drop-out rate of approx. 50%. Consider this when you decide your sample size!

ADVANTAGES

Discover clusters.
Spread insights to larger populations.
Minimize the influence of outliers.
Reduce bias based on one-off experiences.

1-20 PARTICIPANTS

ADVANTAGES

Learn about different views and individual differences.
Gain insights by analyzing the data in depth.
Motivate all participants by offering extensive support and valuable incentives.
Follow up with other methods such as interviews or workshops.

20+ PARTICIPANTS
HOW CAN I MAKE SURE THAT PARTICIPANTS REPORT USEFUL DATA?

CREATE A TEST RUN
Before inviting all participants to your project, start with a small sample and see if you get the information you need. It is very helpful to conduct short interviews with your first participants afterwards, so you can adapt the invitation, their task, etc.

PROVIDE CLEAR GUIDELINES
Even though getting access and reporting experiences is easy, participants need a clear description of what they have to do.

- Explain the main aim of your research, provide clear instructions on how they should report their experiences, and what they should focus on in which level of detail.
- Depending on the project, you could ask participants to document whatever they think is important along their customer journey (e.g. their entire experience in a hotel) or ask participants to document a particular aspect rather in detail (e.g. the breakfast in a hotel).
HOW MUCH GUIDANCE DO PARTICIPANTS NEED?

Name a contact person when you set up your project so that participants know who to ask if they have any questions. Participants see this contact information in the mobile app.

Some written guidelines help participants. If possible you could even do an introductory interview to explain everything in person.

You can also use push notifications within the mobile app to give specific instructions or reminders.

PLACE REMINDERS NEXT TO HOTSPOTS

Remind participants of adding new touchpoints by placing signs at important spots, e.g. the shop entrance, the coffee machine, or the homepage of your website.

USE PUSH NOTIFICATIONS

Use push notifications to remind participants of important moments you want them to report, e.g. the quality of the lunch, a specific conference’s keynote, or parking possibilities.

Mind that push notifications are one-way and participants cannot answer to them.
This is how participants provide the data for your research through the exp.fellow mobile application.

A participant is an individual who takes part in your research by registering for the project through the QR-code or the token code, and by documenting experiences with the mobile app.

This can be your customers, your employees, or other stakeholders. Participants, however, do not use the web-based interface.

GETTING ACCESS

Participants need to download the exp.fellow mobile app and join your project. The mobile application is free to download and is available for iOS on the App Store and for Android on Google Play.
Welcome!

We would like to invite you to share your experiences with us regarding the project EF Guide.

WHAT IS THIS PROJECT ABOUT?
This is a test project for the readers of the EF Users Guide.

WHAT IS EXPERIENCEFELLOW?
The app ExperienceFellow enables you to document your individual experience with a brand, product, or service. Your feedback helps us to understand the real experience our customers have.

ExperienceFellow works like a diary on your smartphone. You can document and evaluate whatever you experience in short stories. Once you are logged in, you can report any moment or aspect of your experience – whatever you think is important or useful feedback, e.g. “receiving an Email”, “checking in at the reception”, or “reading online reviews”.

Please give each of these moments a title and evaluate it from very negative (–2) to very positive (+2). It also helps a lot when you use photos, videos, or text to describe your experience in detail.

GET STARTED
1. Download the mobile application “ExperienceFellow” from the App Store or the Google Play Store.
2. Open the app and scan the QR code below, or type in the project token manually.
3. Start reporting your experience!

Thank you for your collaboration!

Scan this code with the ExperienceFellow mobile app to start collaborating and sharing your experience with us. If you cannot scan the code, please enter the project token manually.

PROJECT NAME
EF Guide
PROJECT TOKEN
642bc1a6e9a0

GET THE APP
Download the app for free (available for iOS and Android).

JOIN PROJECT
Get access to the right project with the QR code or enter the alphanumeric access token manually.

PROFILE
Fill in a short profile (depending on your project settings).

Want to test the mobile app?
Use this demo QR code to try out the ExperienceFellow mobile app. This is what your participants will be using to document their experiences. Download the app to your phone and scan this QR code with the app.
HOW TO USE EXPERIENCEFELLOW / THE PARTICIPANTS’ POINT OF VIEW

REPORT THEIR EXPERIENCES
The content of the mobile app form will depend on your project settings.

1. **TITLE**
   A short name for the touchpoint.

2. **EMOTION**
   Your participant will be asked for satisfaction/importance/experience of the touchpoint, and evaluates by choosing 1 of 5 smiley faces.

3. **NOTES**
   The participant can add a description of what exactly happened.

4. **MEDIA**
   The participant can add pictures and videos to illustrate what happened.

5. **LOCATION**
   GPS data can be tracked automatically. A timestamp is tracked as well.
ABOUT TOUCHPOINT LOCATION TRACKING

GPS data can be tracked automatically for every touchpoint. This makes it possible to see where the participant was located when reporting a specific touchpoint and to follow their movements on a geographical map.

You can decide to include GPS data tracking when setting up a project. It might happen that participants share their experience once it has ended, when they are back home on their sofa. In that case GPS data does not reflect the place where the participant experienced the touchpoint.

We advise you to explain that issue to your customers and to motivate them to capture and share their impressions during the experience. They can always go back and edit the touchpoints after their initial logging.

GPS (the global positioning system) saves the location data where the touchpoint was created. Tracking GPS data allows you to follow your customers’ movement on a geographic map. This is especially useful when your participants get in touch with your service at multiple locations. This is the case especially in touristic or transportation projects.

GPS works especially fine outdoors (with a deviation from 5 to 20 meters). Inside buildings, the app will remember roughly where you are (based on connections with satellites and WIFI), but it can’t follow your exact route.

The app works like a diary on the participants’ mobile phones. They can log in and add an experience whenever they like.
SYNCING

After participants have created touchpoints on their mobile device, they need to be uploaded so that you see the data in the web-based interface. This is what we call “syncing”.

If the mobile device is connected to the internet, syncing will happen automatically and immediately after saving an experience.

Of course participants can update already synced touchpoints at any time.

Participants need to sync their touchpoints with ExperienceFellow’s servers for you to see the data they have uploaded.
INTERNET CONNECTION

Your participants don’t need wifi/mobile data connections while they document touchpoints. If they are offline at the moment of creation, the touchpoints will be synced as soon as the mobile device is connected to the internet again.

They need an internet connection for two occasions: first to download the mobile app and join the project and second to sync touchpoints. This can happen once at the very end of their participation to avoid roaming cost or, if this is not an issue, ongoing directly after a touchpoint is created.

You can also remind your participants to sync their touchpoints by using push notifications.
HOW TO USE EXPERIENCEFELLOW / PUSH NOTIFICATIONS

You can send push notifications to your participants using the ExperienceFellow browser-based app.

Your participants only need their mobile device and internet connection in the beginning, to download the free app, and to sync their data.

However, participants do not have to be connected to the internet all the time – they can sync their experiences later when they are online again.

🌟

There are several ways to remind participants to add their experiences. What about some offline reminders at specific points? E.g. at the entrance of the building, the reception, or the bathrooms?
This is the message that your participants will receive as a push notification. Keep the text short and to the point for the notification to be more effective.

Choose if you want to only provide your participants with information, open a new touchpoint after closing the push notification, or only remind participants of syncing.

You can choose the specific participants you want to receive your push notification. Use our advanced filters to target the participants you want to reach.

Participants can choose whether or not they would like to receive push notifications. If they don’t you won’t be able to target them even if they fit your search criteria.
Okay! The first batch of data is coming in! Let’s have a look at it.

<table>
<thead>
<tr>
<th>Name</th>
<th>Touchpoints</th>
<th>Last Sync</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priscilla Nightingale</td>
<td>15</td>
<td>18 days ago</td>
</tr>
<tr>
<td>Christoph</td>
<td>4</td>
<td>2 hours ago</td>
</tr>
<tr>
<td>Philip</td>
<td>4</td>
<td>2 hours ago</td>
</tr>
<tr>
<td>Niki</td>
<td>12</td>
<td>4 days ago</td>
</tr>
<tr>
<td>Luc</td>
<td>12</td>
<td>4 days ago</td>
</tr>
<tr>
<td>Participant xKsQ</td>
<td>2</td>
<td>1 hour ago</td>
</tr>
<tr>
<td>Scott</td>
<td>3</td>
<td>1 day ago</td>
</tr>
<tr>
<td>Ramona</td>
<td>3</td>
<td>1 day ago</td>
</tr>
<tr>
<td>Angus</td>
<td>3</td>
<td>1 day ago</td>
</tr>
<tr>
<td>Participant Lt4K</td>
<td>3</td>
<td>1 day ago</td>
</tr>
</tbody>
</table>
PARTICIPANTS OVERVIEW

In this section you can see a list of all participants that have signed up for your project.

Clicking on the name of a participant will display their profile, which includes the information they have provided (in case your project settings request them to fill in a profile), and an overview of the data they have synced.

Through this section you also have access to the other participant management tools, such as the default invitation that you can send to your participants to invite them to join your project, and to the push notifications tool.

1  PARTICIPANTS LIST
See a list of all of the people who registered for the project and find out how many touchpoints they've created.

2  PARTICIPANT NAME
If a participant has filled the profile with their name, it will be shown in the list. Otherwise their unique identifier is displayed for reference.

3  SYNC DETAILS
These two columns show the sync status of participants. If they are empty, the participant has not synced any data yet.

4  PARTICIPANT PROFILE
Click on a participant’s name to see a summary of the participant and their customer journey.

5  INVITE PARTICIPANTS
See the default invitation text and PDF which you can send to your participants.

6  PUSH NOTIFICATIONS
Access the push notifications tool to communicate directly with your participants.
HOW TO USE EXPERIENCEFELLOW / ANALYZE AND EXPORT DATA

PERSPECTIVES OVERVIEW

This is an overview of your raw data, as well as of your different perspectives.

A perspective is a complete copy of your raw data which can be edited. In a perspective, you can drag and drop touchpoints, delete them or insert gaps in order to arrange them into the order you like. You can tag touchpoints and filter them. You can also filter by emotional values, text, or profile information, e.g., gender or age.

You can create as many perspectives as you want, e.g., can create different perspectives for different topics or for different researchers.
Everything you do in one perspective won’t affect other perspectives. Thus, perspectives help you to focus on different topics and analyze data using several points of view.
HOW TO USE EXPERIENCEFELLOW / ANALYZE AND EXPORT DATA

CUSTOMER JOURNEYS
The customer journey is a sequence of touchpoints the customer experiences in the course of making use of your product, service, or brand.

A touchpoint is any direct or indirect point of contact between you and your customer. Each touchpoint results in an experience – either positive, negative, or neutral.

1 CUSTOMER JOURNEY SUMMARY
See the average satisfaction score, age, gender and the participant’s name.

2 CUSTOMER JOURNEY
You see the customer journey of each of your participants.

3 EMOTIONAL CURVE
Expand the journey to see the emotional curve.

4 TOUCHPOINT OVERVIEW
GPS, pictures, and videos are shown with an icon, as well as the satisfaction rating (the colored triangle on the bottom).

5 EXPORT
Export each journey as a high-resolution PDF or CSV, as a whole or single touchpoint. You can choose if you want to include tags and comments.
TOUCHPOINT DETAILS
This is the touchpoint data your participant shared with you by filling the reporting screen on their mobile.

1 TITLE
Main issue of the touchpoint.

2 PARTICIPANT
Who reported this touchpoint.

3 EMOTION
The emotional value the participant assigned to the touchpoint.

4 TAGS
Tags which have been assigned to the touchpoint by the researchers.

5 DESCRIPTION
The participant described their experience in more detail.

6 ATTACHMENTS
The participant can attach one or more pictures and videos to the touchpoint.

7 LOCATION
Where was this touchpoint reported.

Print the journey by using a normal printer or a plotter.
If you tracked GPS data, you can see how your participants moved on a geographic map.

SHOW OR HIDE JOURNEYS
See one or more journeys at the same time to compare your customers’ movement.

CLUSTERS
Clusters of positive or negative touchpoints give you a hint of where you should dig deeper. What happens at this place? What is going wrong and how can you improve it?

TOUCHPOINT DETAILS
Click on a tracking point to show touchpoint details and see what happened at this touchpoint.

Show all journeys on map
Hide all journeys
Hide/show connections

Christoph
Philippe
Niki
Luc
Masa to
Remco
Angus
Julio
Jakob
stefan
Julia
Asking locals for directions

JAKOB
2015/04/21 - 11:26
Now you can start digging deeper into your data!
Start with creating a new perspective – an exact copy of the raw data you can use for your analysis.

Here is an overview of the different actions you can perform to manipulate the data in your perspectives: sorting, adding and removing gaps, commenting, and tagging touchpoints.
1. **SORTING**
   Drag and drop touchpoints along the customer journey to adjust their sequence. Sorting them makes comparing different journeys easier.

2. **GAPS**
   Inserting gaps helps you not only to sort data, but also to mark missing touchpoints. You can add gaps by positioning the cursor between the two touchpoints where you want the gap to be. A small plus-symbol will appear. By clicking on it, you can insert and delete gaps.

3. **COMMENTS**
   Comment on touchpoints to make sense of your data, add notes and to share your insights with other researchers.

4. **TAGS**
   A tag is a word that you associate with touchpoints and is used to group them. Tagging will help you filter the data in order to find certain patterns. Add one or more tags to the touchpoint by just typing it into the field, or choosing out of the list of tags you’ve already used.

You can assign tags directly using the quick tag tool.
Use the filter tools to analyze and explore the data submitted by your participants. You can use a data filter to find touchpoints matching certain conditions, or a participant filter to search for customer journeys.
The counting bar can be useful when using two or more filters at the same time. They help you to discover similarities or connections between tags etc. For example, you could find out that women (participant filter ▶ filter by gender) have mainly negative experiences with touchpoints tagged with “central station” (data filter ▶ filter by tag) and “night” (data filter ▶ filter by text), but men don’t. Then you can go in depth and see what happens to women by looking at the highlighted touchpoints.

DATA FILTER ELEMENTS
You can filter data by touchpoint text, emotional value or tag. You can use the filters either one by one, or at the same time.

HIGHLIGHTS
Touchpoints that match the filter will be highlighted in the customer journeys.

COUNTING BAR
The summary shows you how many touchpoints fit your filter request and shows the amount of negative, neutral, and positive touchpoints. This helps you to instantly get an impression of how the experiences’ emotional values are distributed within the perspective’s data.

COLLAPSING TOUCHPOINTS
If you apply a filter to the perspective, touchpoints that fit the filter are highlighted more clearly and touchpoints that do not fit are collapsed. If you want to see the details of a collapsed touchpoint, hovering it will extend it again.

SHOW/HIDE UNMATCHED JOURNEYS AND TOUCHPOINTS
This checkbox allows you to activate and deactivate the new view. This makes sure that you do not lose the context of the touchpoint.

PARTICIPANT FILTER ELEMENTS
You can also filter your data based on the participant’s profile.

SIMULTANEOUS FILTERS
The green funnel shows you that the data filter is still active. This means your participant filter will be used additionally, not exclusively.
HOW TO USE EXPERIENCEFELLOW /
ANALYZE AND EXPORT DATA

EXPORT

You can export customer journeys and perspectives in different formats, such as PDF, CSV and ZIP.
1 FILETYPE
Use the high-resolution PDF export for the visualized customer journey. Use the CSV export in order to further analyze your data. Use the ZIP export to export all your assets.

2 EXPORT OPTIONS
Decide if you want to include tags and comments.

3 PAPER SIZE
Plot the customer journey in A0 size or use a normal printer to print each touchpoint on one A4 page and tape the customer journey on a wall.

You can export either a single customer journey (as a PDF) or the whole perspective (as a CSV or ZIP file).
UPDATE PERSPECTIVE

As long as you did not stop your data collection, the data you see can still change.

You can update an existing perspective easily and add the new data gathered without losing all of your adaptations.

Your existing data will keep its tags, comments and order. New touchpoints will be tagged with a timestamp so you can filter and work on the new touchpoints.

This also allows you to filter the data by the timestamp tag and to analyze touchpoints according to it. So you can, for instance, observe weekly changes in your customers’ experience.
Updating a perspective will synchronize the current data with the latest participants and datapoints synced to the raw data of the project.

1. **UPDATE REPORT**
   Report of the changes that will be made in the current perspective after merging with the raw data.

2. **OVERWRITE DATA**
   Check if you want to overwrite existing touchpoints with the newest status from raw data or leave unchecked if you prefer to keep the touchpoints as they are in the perspective.

3. **DELETE TOUCHPOINTS**
   Delete touchpoints participants have deleted in their dataset but are in the perspective or leave unchecked to keep them in your perspective.

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### Update perspective

Updating this perspective will synchronize your current data with the latest participants and datapoints synced to the raw data perspective of this project.

After updating this perspective with the raw data, these changes will occur:

<table>
<thead>
<tr>
<th>Change Description</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>New participants</td>
<td>3</td>
</tr>
<tr>
<td>Updated participants</td>
<td>1</td>
</tr>
<tr>
<td>Datapoints synced by new participants</td>
<td>24</td>
</tr>
<tr>
<td>Datapoints added by existing participants</td>
<td>5</td>
</tr>
<tr>
<td>Updated datapoints</td>
<td>0</td>
</tr>
<tr>
<td>Deleted datapoints</td>
<td>1</td>
</tr>
</tbody>
</table>

- **2**  Overwrite updated datapoints with the latest status from raw data.
- **3**  Delete the datapoints that have been deleted from raw data.

The affected datapoints will be assigned a new tag which you can use in the tagging and filtering tools.

---

**UPDATE PERSPECTIVE**
Please be patient, this may take a while ...
How much time you need for data collection depends on the duration of your service offering and the amount of data you want to collect.

An experience can either be for a fixed period of time (e.g., a three-day event), or an ongoing experience (e.g., a grocery shop experience).

You can either implement ExperienceFellow for a specific period of time or continuously collect data. If you collect data for a specific period of time, you get a snapshot of the experience at that moment in time.

We recommend periodically repeating this if you go with a specific period. Otherwise, you can continuously gather feedback on your offering and iterate as you go.

If you decide you have collected enough data and you do not want your participants to report their experiences anymore, you can stop data collection. At this point, your participants won’t be able to access the project anymore.

After stopping data collection, you can start data analysis (or continue, if you already started during data collection).
If you do not need a project for analysis anymore, you can archive it. Archiving a project works similarly to how you would archive a book: you put it into storage because you do not need it at the moment. When you need it again, you can unarchive the project.

If you archive a project data won’t be lost, it will still be saved on our servers. However, you can’t access, analyze or export it anymore. The project will be hidden on your dashboard, making it easier for you to keep an overview of active projects.

Archiving a project means that the respective participants no longer count on your billing volume. There is no time limit for archiving a project as long as you have an active ExperienceFellow account.

**TOGGLE ARCHIVED PROJECTS**
Show or hide archived projects. By default, archived projects are not displayed on your dashboard.

**STATUS LABEL**
Easily identify archived projects by their status label.
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ABOUT THE COMPANY

ExperienceFellow is a product of More than Metrics GmbH. The company is a startup based in Innsbruck, Austria. The software is based on extensive research and numerous academic research projects and prototypes.

The founders, Marc Stickdorn and Jakob Schneider, have been working in the field of service design for years and published the award-winning book “This is Service Design Thinking” in 2010.

Furthermore, they published a vast number of academic publications on the topic of mobile ethnography as an innovation approach in qualitative research.

In 2013, they founded ExperienceFellow as an academic spin-off together with mohemian ventures GmbH & Co KG and MCI Management Center Innsbruck. ExperienceFellow is publicly available as Software-as-a-Service solution since March 2015.

Besides ExperienceFellow, the company also provides two co-brands:

► Smaply (www.smaply.com) is a software which helps you to visualize your customer journey maps once you have collected enough data.

► Mr. Thinkr (www.mrthinkr.com) is an online-shop which provides you with templates you can use for your service design workshops, e.g. persona pads, journey maps or stakeholder maps.
We hope this guide was helpful for you. Comments, feedback, ideas? Drop us a line!

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EXPERIENCEFELLOW COMES FROM THE PEOPLE BEHIND “THIS IS SERVICE DESIGN THINKING” ...

... AND “THIS IS SERVICE DESIGN DOING” (OUT SOON).

www.experiencefellow.com

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