

INCREASE SALES, CUSTOMER RETENTION & REFERRALS

Mapping the Customer Journey

SUMMER ALEXANDER



Summer Alexander, CEO, Simply Marketing Solutions

Greetings!

I'm thrilled you decided to download this guide designed to help you map out the journey your customer's take when interacting with your brand. This exercise will help you to understand the path your prospects take to becoming paying clients and what obstacles might prevent them from moving forward.

Before we get started let me help you conceptualize why it is important for you to complete the customer journey mapping exercise.

Take a moment and step outside of the role you play in your company and think of yourself as a consumer. What steps do you take when deciding to make a purchase? What assurances are you looking for before you decide to purchase? What obstacles have you encountered when trying to make a purchase?

I recently relocated from Chicago to Dallas which required me to find new healthcare professionals for myself and my family. Nearly every time I was in my car I would hear a commercial on the radio about one of the "best dentist offices" in my area and decided to visit their website to learn more.

I was met with frustration at every stage of the customer journey!

- Frustration #1 – The website took forever to load and when it finally loaded there were a lot of fancy images of the staff but no information relevant to me as a potential new customer.
- Frustration #2 – I wanted to know right away what insurance they accepted because if they did not accept my provider there was no point in me going any further. I had to click around on multiple pages to finally locate this information.
- Frustration #3 – I needed to schedule an appointment for my daughter to get an exam and cleaning before she returned to college for the fall semester. Their online form would only let me schedule the exam separately from the cleaning and the available dates for both

were so far away that I would not be able to schedule them before my daughter left.

- Frustration #4 – Because I was visiting the website outside of office hours and therefore could not call, I completed a form on the website to have someone contact me and I never received a response.

It is clear to see why I decided to locate a different dentist but let's think about this from the viewpoint of the company. They are spending money advertising their company on the radio, television, and online. Yet they are creating a frustrating experience for potential customers who are looking to do business with them!

Creating a customer journey map would help them to identify these frustrations and implement strategies to eliminate them. This could mean making some design tweaks to the website, ensuring there is a team member assigned to responding to customer inquiries within 24 business hours, and updating their appointment types in their booking form.

Are you starting to see why having an understanding of the customer journey is so important? As the business owner you may think you have a great website with great pictures and the ability for customers to schedule online. However, from your customer's viewpoint you have a slow website with unnecessary pictures and an annoying scheduling process.

The customer journey mapping process is typically one carried out by larger organizations however, I believe it is a valuable and relevant exercise even if you have a one-person company.

If you do have a team, I recommend including them in this process as it will be important to obtain insights and recommendations from those with varying roles and responsibilities.

Whether you represent a large business or a one-person business, to gain a complete view of the customer journey invite a few current and prospective customers to join you in the activity. Your customers will offer an important and necessary external perspective.

The goal of customer journey mapping is threefold:



1. Identify – In this phase you will determine who your ideal customers are, how they learn about your products and services, what steps they take before deciding to purchase, what support they will need after the purchase, and what your company needs to provide in order to retain them as customers.
2. Assess – For every step along their journey you need to assess what actions they will take, what questions they will have, and what frustrations they might run into that could prevent them from having a good experience.
3. Improve – Once you have identified the actions, questions, and frustrations potential customers face, you will need to create a plan to address each concern.

To complete the customer journey mapping exercise gather your team, print this workbook, and complete the following steps:

Step 1 – Complete the Buyer Persona Worksheet. Before you can start the customer journey map you need to identify all the key characteristics, habits, goals, and decision-making capabilities of your potential customers.

For purposes of this worksheet you will narrow your ideal clients down to one person. Locate a picture online of what you imagine this customer to look like and attach it to the circle in the center of the worksheet. (You can visit unsplash.com or pixabay.com for high-quality, free images) Review the sample worksheet for examples of how to complete the buyer persona prompts.

Step 2 – Complete the Customer Journey Map. Starting at the top of the map you will input the demographics, psychographics, geographic location, and goals of the customer you identified on the buyer personal worksheet.

Next you will input the actions a potential customer might take when navigating through the various phases of the customer journey. These phases are as follows:

Awareness

This includes the various ways customers might learn about your company's products and services. Online this could be a Facebook ad, an Instagram post, a Tweet, a YouTube video, a Google search, or a recommendation from a friend. Offline this could be meeting a representative of your company at a networking event, attending a speaking engagement, stopping by your booth at a business expo, or hearing your advertisement on the radio.

Write down the actions a potential customer would take after learning about your company.

- Exchange business cards
- Visit your website
- Call your office
- Like your social media page

Write down the questions a potential customer might have at this stage in the journey.

- What products and/or services does the company provide?
- Do they have a solution to my problem?
- What are my next steps?

Write down the frustrations a potential customer might have at this stage in the journey.

- The website takes too long to load.
- It's not clear what products and/or services are being offered.
- I lost their business card after the event.

Rate the overall Customer Experience (CX) at this point in the journey.

- Poor
- Fair
- Average
- Good
- Excellent

Identify the improvements you can make to improve the experience the customer has in the awareness phase. Your goal is to move the experience from poor, fair, average, or good to excellent. Be sure to set timelines and assign the tasks to the team member responsible for making the changes.

Decision

Once a potential customer has passed through the awareness phase they enter the decision phase where they will research and evaluate how and if they want to move forward with purchasing from the company.

Write down the actions a potential customer would take after making a decision to move forward with your company.

- Schedule a consultation
- Request a proposal
- Make a purchase

Write down the questions a potential customer might have at this stage in the journey.

- Is this company trustworthy?
- What results have other customers had after purchasing?
- How much does it cost?

Write down the frustrations a potential customer might have at this stage in the journey.

- Too many unanswered questions.
- The checkout process is too cumbersome.

Rate the overall Customer Experience (CX) at this point in the journey.

- Poor
- Fair
- Average
- Good
- Excellent

Identify the steps you can take to improve the experience the customer has in the decision phase. Your goal is to move the experience from poor, fair,

average, or good to excellent. Be sure to set timelines and assign the tasks to the team member responsible for making the changes.

Support

Once a potential customer has made the decision to purchase your products and services they move to the support phase. In this phase, your company is responsible for ensuring the customer receives their deliverables in a timely manner, having staff available to answer questions about setup, use, or implementation, and maintaining ongoing communication in order to build a long-term relationship with the customer.

Write down the actions a potential customer might take after completing a purchase with your company.

- Call or email customer support
- Search the website for F.A.Q.'s
- Search the internet for help

Write down the questions a potential customer might have at this stage in the journey.

- How do I setup this product?
- What do I do if I did not receive everything I ordered?
- How can I make a return?

Write down the frustrations a potential customer might have at this stage in the journey.

- Customer service is closed.
- F.A.Q.'s did not answer my questions.
- It's the weekend and I cannot get help until Monday.

Rate the overall Customer Experience (CX) at this point in the journey.

- Poor
- Fair
- Average
- Good
- Excellent

Identify the steps you can take to improve the experience the customer has in the support phase. Your goal is to move the experience from poor, fair, average, or good to excellent. Be sure to set timelines and assign the tasks to the team member responsible for making the changes.

Retention

Customers who make a purchase from your company will ultimately move into the retention phase. This phase is ongoing and requires you to nurture the relationship by offering incentives for them to purchase again, rewarding them for referrals, and maintaining ongoing communication with them.

Write down the actions a potential customer would take after entering the retention phase.

- Make a referral
- Provide a testimonial
- Make another purchase
- Engage with the company on social media

Write down the questions a potential customer might have at this stage in the journey.

- Is there an incentive for making referrals?
- Does the company have other products or services that will benefit me?

Write down the frustrations a potential customer might have at this stage in the journey.

- I've sent a lot of referrals but have not been rewarded in any way.
- This product is no longer meeting my needs, but the company has not made any updates.

Rate the overall Customer Experience (CX) at this point in the journey.

- Poor
- Fair
- Average

- Good
- Excellent

Identify the improvements you can make to improve the experience the customer has in the retention phase. Your goal is to move the experience from poor, fair, average, or good to excellent. Be sure to set timelines and assign the tasks to the team member responsible for making the changes.

That's it! Remember the overall goal of this activity is to make improvements in the experience your customers have when interacting with your brand. Providing an excellent experience will help you to increase customer sales, retention, and referrals.

Examples of improvements a company might make include:

- Restructure the website home page to make it clear what offerings the company sells.
- Add a testimonial page to the website to provide potential customers with proof of the results other customers have achieved with our offerings.
- Add an online scheduling system instead of asking customers to send us an email.
- Survey our customers to learn more about their experiences with our company.
- Improve our Frequently Asked Questions documentation.
- Add an online chat feature to the website.
- Extend our customer service hours to include one weekend day.
- Implement a customer referral program.
- Offer special discounts and incentives for customers who make multiple purchases.
- Host an annual customer appreciation day.
- Send a weekly newsletter to customers.
- Create a video tutorial of how to setup and use our products.
- Implement a money back guarantee program.
- Provide additional customer service training to our staff.
- Hire additional team members or consultants to assist with responding to customer inquiries.



This activity can feel overwhelming, but it does not have to be complicated. You can map the journey on a whiteboard with sticky notes or print out worksheets for all of your team members.

Start with mapping the journey of one ideal client who is looking to purchase your most expensive solution to their most pressing need, want, or desire. Once you have addressed potential issues in the Customer Experience (CX) with this customer, you can go back and map out journeys of additional customers and the other products and services your company offers.

If you and your team need assistance with this exercise I would love to help you facilitate the activity and develop an actionable plan to help to improve your customer experience.

Please call 800-598-7015 or email summer@simplymarketingsolutions.com to schedule a consultation.

Happy Customer Journey Mapping!

Buyer Persona Worksheet

Demographic information:

Problems the customer has that your company solves::

A day in the life:

Values and goals:

Insert photo

Where the customer gets the scoop:

The experience the customer wants when seeking your services:

Role and decision making capabilities:

Common objectives to purchasing:

Buyer Persona Worksheet Example

Demographic information:

Mid 40's w/ advanced degree
Married w/kids
Lives in north suburbs of Chicago
\$250k in business revenue
In business 5 years/ resourceful
Works with other micro businesses

Problems the client has that your company solves:

Doesn't understand market segmentation
Not social media savvy
Doesn't have time to consistently market business (feast or famine cycle)
Doesn't have a firm understanding of how to develop a strategic marketing plan

One day in the life:

Still very much hands on in the business although she has a small team
Gets to the office by 8am, leaves by 6pm
Goes to the gym for a one hour cycle class
Cooks dinner and helps with homework
Spends evening with family but exhausted
Checks email before bed

Values and goals:

Wants to create a life on own terms
Has a sense of pride/accomplishment from business
Desires to move from working hard to smart
Believes in giving back to community



Jacqueline Stewart

Where your client gets the scoop:

Networking events
Industry tradeshows/expos
Trusted colleagues
Women in business events (paid)
Print media (Black Enterprise, Entrepreneur, Inc.)

The experience the client wants when seeking out your services:

Mentoring/Advising
Inside scoop & key contacts
Done for you but kept in the loop
High level of customer service
Doesn't want to micro manage

Role and decision making capabilities:

Owner of company – final decision maker
May have other trusted adviser weigh in on major decisions for company
Consults with spouse on major decisions

Most common objectives to your services and products:

Needs to know the investment will provide a tangible ROI
Thinks because they've had some success that they will figure it out on their own



Goals

Geographics

Psychographics

Demographics

Customer

Offering:

Phase

Awareness

Decision

Support

Retention

Actions

Questions

Frustrations

Overall CX

Improvements

| | Demographics | Psychographics | Geographics | Goals |
|--|---|---|--|--|
| Customer | Wife Mother of 2 grade school kids 40 years old Business owner \$250k | Loves her business but is exhausted Believes in giving back Values mentorship Decision maker | Lives in the north suburbs of Chicago Homeowner Has office space outside of the home | Wants to grow biz to \$500k Wants to take on a leadership role and give more responsibility to team Needs to hire more staff |
| Offering: Online Marketing Plan Course | | | | |
| Phase | Awareness | Decision | Support | Retention |
| <i>Actions</i> | Attends networking event Picks up a company brochure Visits company website | Schedule a consultation Ask for a proposal Sign a contract Make a deposit | Email customer service Visit website F.A.Q.'s Submit a contact us form on the website | Make an additional purchase Provide a testimonial Refer new business Repurchase same product |
| <i>Questions</i> | What products/services are offered? Can they solve my problem? What is their history? | Are they trustworthy? How do I know? What proof of results exist? Cost? | How do I use the product? Can I return the product? I can't get the product to work is there help? | Are there discounts for current customers? Do they offer incentives for referrals? |
| <i>Frustrations</i> | Website takes too long to load. I'm not clear about what is being offered and expected results. | I don't want to get scammed or waste money. I have too many unanswered questions. | Are there discounts for current customers? Do they offer incentives for referrals? | I'm not rewarded for referrals. New customers get discounts but none for loyal customers. |
| Overall CX | Poor | Fair | Poor | Good |
| Improvements | Restructure home page remove large images. Add online scheduler. Add product/service descriptions. | Add testimonials and case studies to the home page. Explain cost structure and process on website. | Add online chat to website. Revamp F.A.Q.'s Extend customer service hours, possibly add weekend hours. | Implement a customer referral program. Add customer loyalty incentives. Send a weekly newsletter. |



Next Steps & Notes