



# Your Step-by-Step Guide to Creating the Perfect Customer Journey

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A guide aimed at managing directors who are looking to improve and perfect the customer journey and boost their sales.



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# Part 1: An Introduction to Customer Journey

## 1. Introduction

A customer journey is one of the most important aspects of sales and marketing in general. By definition, a customer journey is a process that customers are led on from the first moment of initial interest, leading down the sales pipeline, and ultimately arriving at the purchase point — or even better, conversion into a loyal customer.

Present-day marketers that focus too heavily on marketing tactics that don't involve the customer at each step of the way, are missing the most valuable sales tool of them all — the customer themselves.

Setting up a perfect customer journey isn't something that happens overnight. However, it's imperative to determine not only the correct flow that customers should be led through but also the steps it takes to establish truly invested, loyal customers.

Throughout this guide, we'll be discussing how to do just that. We'll touch on the importance of customer journeys and the best strategies to visualize and present them as well as the entire journey broken down step-by-step, along with advanced strategies and tips to creating customer journeys that actually convert.



## 2. Why building a customer journey is important

No matter what industry you're in, the customer should always be one of, if not the top priority. This is especially true for B2B companies when the "customer" isn't a traditional consumer.

### More Efficient Funnel Transitions

How long does it typically take you to move a prospect from one funnel position to another? The answer for most B2B marketers is—too long. This is in part due to not having a clear roadmap for each type of customer, as well as not delegating responsibilities clearly enough.

Having a concrete customer journey established not only makes it easier to transition leads from one stage of the funnel to the next but also makes them feel as if the company has a genuine interest in helping and best serving their needs by personalizing the experience.

### Increase Customer Engagement

People don't like being sold to by robots. Even if your marketing flow is mostly automated, including personal touches and useful content goes a long way.

At the end of the day, people like interacting with people. When customer journeys are executed well, your marketing funnel becomes something your customers will actually look forward to, instead of letting your emails and messages get lost in the ever-growing inbox graveyard.

By crafting an effective customer journey, you're not only increasing direct engagement with your leads but also making it more likely that they will engage with you and your product long term.

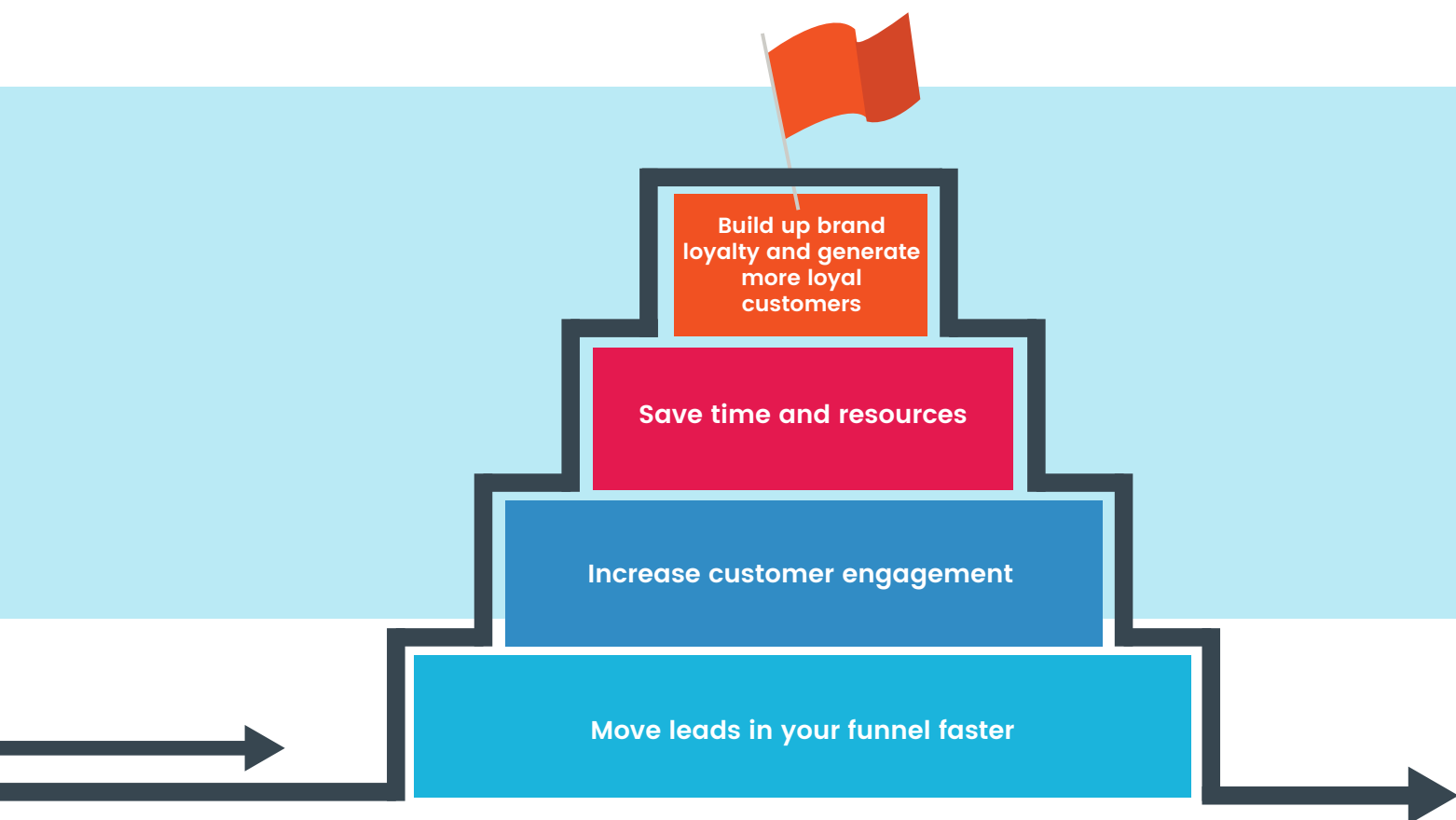
## Save Time & Resources

Customer prospecting and lead management are one the most time consuming, and sometimes expensive, aspects of marketing.

By having a concrete plan of action specifically designed around the best ways to quickly and effectively move a customer through a funnel not only saves time planning and curating messages and content, as well as resources spent on crafting said messages but will actually result in increasing revenue by converting more high-quality leads into loyal customers.

## Build Brand Loyalty

Research shows that the average person requires a minimum of 7 valuable touchpoints from a business before they're ready to commit to buy, or become a customer.



This is where a customer journey becomes so important — as it gives you the opportunity to gain your prospects trust by engaging with them at multiple stages while offering value and educating them at the same time.

Once your prospect is eventually converted into a customer, the relationship you've already built makes it easier to turn them into loyal brand ambassadors for your business.

“The average consumer needs at least 7 valuable touchpoints from your business before they're ready to become your customer.”

### 3. How to visualize customer journeys

Visualizing customer journeys, and not just letting them live in your head or on a piece of paper goes a long way to effectively explain the desired process to the rest of your team, as well as creating a base journey that you can improve and build upon.

One of the most popular ways of doing just this is called a Customer Journey Map.

Customer Journey Maps outline every step of the process and essentially allow you to get inside the “mind of the consumer” to best educate and further lead them into your sales pipeline. This includes everything from first gaining awareness of a brand on social media, for example, to receiving a “thank you for your business!” email post-purchase.

While there are many different types of customer journey maps, Retail, B2B, eCommerce, to name a few, they all have the same goal at the end of the day:

Understanding who your customer is, the thought process they go through, and the best ways to engage them with your product.



## Part 2: Creating The Customer Journey—Step by Step

In this section, the customer journey will be broken down step by step, observing the importance of each and discussing how to capitalize on them.

### Step

# 01. Determine your preferred persona or segment

The first step in any customer journey is identifying the segment or target customer for your specific business. Ideally, you should have multiple customer personas and segments created, to reflect the different types of customers your business attracts.

Customers can be segmented by many different methods. For example, where they live, what they do for work, their annual income, their interests, etc. With your customer base already segmented by behavior and demographics, you have the most important piece to then start crafting your customer journey.

However, for the purpose of building a singular customer journey, it's best to focus on the persona or segment that has performed best in the past, and to double down on why that is, and to make the journey even better. To do this, review the funnel data for your past lead generation or lead management campaigns.

Ask yourself questions like,

“Which customer segment responded the most to the content I offered?”

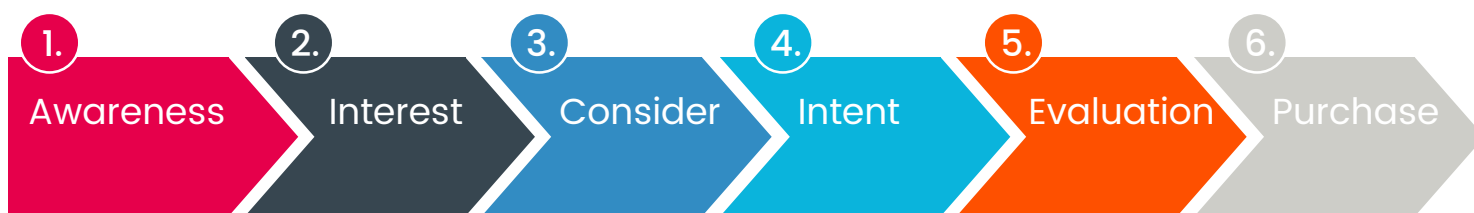
“What type of persona asked the most questions at the beginning?”

Asking these types of questions, and looking over your funnel data will help you predict the “winning segment”, AKA the type of customer you should be building your primary customer journey around.

## Step 02. Visualize the stages of the customer timeline

Pointing back to Customer Journey Maps, which we mentioned in the introduction of this guide, this is the easiest and most efficient way to visualize the specific stages of the customer timeline.

Here are the 6 typical stages of the customer timeline which we'll be following to help you structure your customer journey:



### Awareness

Awareness is the uppermost stage of the customer funnel. Potential customers reach this stage by first having a need they want to be fulfilled. For this section, we'll use a social media scheduling platform as an example. They've done some research on the best tools, and they eventually stumble upon your blogs and or social media posts detailing the best ways to schedule a week of posts.

This is the awareness section as it's the first exposure a potential customer has to your brand. From here, lead generation can take place, as a potential customer signs up for your newsletter, blog, or follows your social profiles.





## Interest

Once leads are initially generated, they move on to the Interest phase of the buying process.

This is the time to introduce the prospect to more aspects of your business, its products and any other valuable information you have to provide. This is the opportunity for brands to begin to develop a relationship with the people who have submitted their lead generation information and qualify them accordingly.

From here, leads can be placed in a lead nurturing cycle, where they are delivered content and messaging that is more targeted around the general industry and brand information.

## Consideration

In the consideration phase, leads have been converted into qualified prospects, and are seen as prospective customers.

Here, marketers can send prospective customers more information about their products and how they're suited to the prospect's specific needs. This can be achieved through automated email campaigns, while at the same time continuing to nurture them with targeted content, relevant case studies, free trials or discounts, and more.

## Intent

To reach this stage, prospects have had to demonstrate their interest in purchasing a product. This can be done in several ways, such as a survey after a free trial, or adding an item to an e-commerce cart.

This stage gives marketers the opportunity to make their strongest case to the customer, as they know that they are just on the edge of purchasing.



## Evaluation

In the evaluation stage, buyers are making their final decisions on whether or not a brand's product or service is right for them. Typically, marketing and sales teams work closely together in this stage to nurture the decision-making process and convince the potential buyer that their product is the right fit for them.

## Purchase

Woohoo! You made it to the purchase stage. This is the last stage in the marketing funnel when a prospect has made the decision to become a buyer. However, this is not where your work as a marketer ends just yet.

Even after the purchase stage, by staying available and eager to answer any questions a customer may have, you'd be reinforcing their idea to continue to choose your product or service, and better yet, send referrals your way.

## Step

# 03. Define the steps in your journey

Not every funnel will perform exactly like the one outlined in the previous step. In fact, there can be considerably different funnels depending on the type of business you are in.

For example, the marketing funnel can very well differ between B2C and B2B businesses, therefore it's essential that you lay out the correct steps in the customer journey that's most suited to your business and your customers.

The key difference between a funnel for B2C businesses is that most customers will go through this journey primarily by themselves (apart from friends or family), and will not have as many direct touchpoints with your marketing or sales team. While B2B businesses have a larger group that they go through the journey with (team members, bosses, etc.), and they do interact directly with the businesses, typically at the lower ends of the funnel.



## Step **04** • Identify your customer touchpoints

Now that you know the stages of the funnel your potential customers will be going through, it's important to identify the points at which you can communicate with them and aid their decision-making process.

To do this, list all of the physical or digital interactions a customer will experience during their cycle with your product or service. Depending on your business, this might include things like:

- Social Media
- Your Website Contact Form
- Sales Reps
- Email Newsletters
- Direct Mail
- Search Results

Once you've identified the touchpoints that you have with potential customers, it's time to decide the best way to capitalize on these opportunities. Whether it's through targeted content, free trials, or simply learning more about the customers' needs to best provide them with the help they're looking for.

## Step **05** • Create customer questions for each stage

As you review each stage of the buying process, it's incredibly helpful to identify the most frequently asked questions or information your prospective customers are looking for.

As an example, the discovery and awareness phase is often where targeted content can make the most impact. Content at this stage shouldn't be sales focused, instead offering valuable industry information that solves a problem the prospect is having.



This type of content could come in the form of blog posts, videos, infographics, and webinars that educate your audience. This part is crucial in providing them with the confidence needed to move to the next stage of the buying funnel.

For each question, provide answers and general topics that suit the question. This is important as those answers will steer the direction of your content strategy with each potential customer.

Finally, decide upon and test the best formats for delivering these answers to your prospects along with how you'll be delivering them (whether it be social media posts, email, blog posts, e-books, webinars, tutorials, etc.).

## Step **06** • Identify pain points

Similarly to identifying the most frequent questions that customers ask at each buying stage, it's also important to identify the pain points and barriers that prospects face, stopping them from making a purchase.

To find the pain points at each stage, simply listen and observe how the prospect interacts with your business. For example, if they've placed an item in their cart several times, but have not yet purchased it yet, consider that price/shipping may be their barrier.

Or, if a prospect does not engage with the content you provide to them through a marketing automation funnel, consider that it is not the right content fit for the problems they're having or the solutions they're looking for.

Understanding the barriers and limitations your prospective customers have when interacting with your business is crucial for correcting and improving your customer journey.



## Step **07** • Define trackable metrics for each stage

Without data and clear metrics, how are you really able to see the journeys your customer goes on, and more importantly, improve these journeys?

The most efficient way to collect and track the data of your customer journeys is by understanding and utilizing the data that your company is already tracking.

This could be as simple as tracking the open/click-through rates of emails that you send in the awareness/discovery section of the funnel, or tracking how much your customer uses the demo version of your product.

It's important to survey each stage, and realize the data that is already being collected, then use this data to either double down on what is working, or cut out what's driving customers away.

## Step **08** • Assign clear roles

Planning and implementing an effective customer journey is no one-man effort. Review the responsibilities that the members of your marketing and sales team currently have, and delegate the positions accordingly.

Different disciplines typically know their strengths best, from community development to customer service, to strictly sales professionals, having a team dedicated to different aspects of the customer journey is crucial in developing a valuable and effective relationship with the prospective customer.

Once you've gone through this guide, and have a good plan in mind of the direction you'd like to take for your customer journey, sit down with your team and explain and assign roles.

## Step **09** • Base opportunities off pain points

As described in the previous steps, identifying the pain points of your prospective customers is one of the most important steps you can take in optimizing your customer journey.

Keeping the same examples, if a customer has placed an item in their cart multiple times but has not purchased yet, consider offering free shipping or a 20% discount code. Most times, even a gentle nudge like this can convince a customer on the fence to purchase.

Additionally, if a prospect in one of your marketing automation funnels is not responding or engaging with your content, consider adding them to a different automation funnel that's delivering new content they haven't seen yet. Having multiple perspectives of a business and their products or services can be extremely beneficial to eventually making the final purchase decision.

## Step **10** • Analyze & optimize

Like everything in marketing and sales, customer journeys are an on-going process and a process that deserves more attention and time from marketing teams that it receives.

As you establish and implement your primary customer journey, really take the time to listen and get in the heads of your customers. Find out what makes them tick, discover what helps them learn best, and ultimately what convinces them to buy.

Using analytics, customer feedback, and direction from your sales team continue to analyze and tweak your customer journey to match the different segments and personas you attract.



## Part 3: Strategies & Tactics for Journeys That Convert

In this section, we'll be discussing the top strategies and tactics for forming customer journeys that actually lead to the bottom line — more revenue. Topics in this section will include how to optimize an omnichannel experience, identifying issues, and building customer lifetime value.

### 1. An omnichannel customer experience

Omnichannel marketing refers to the practice of providing a seamless user experience for your customers across all channels relevant to their buyers' journey. This represents a shift in the way people progress through the marketing funnel.

The buying process used to be a one-stop-shop — but it is far from that now. For modern businesses and companies to succeed they literally need to be omnipresent, meaning, everywhere. The modern-day consumer expects to be able to view your products or services online, download offers emailed to them, call or message a customer service rep, and easily share their experience on social media.

Whether you are a digital company, have physical locations, or both, marketers are having trouble converting the constantly connected customer. Here are four simple strategies to keep in mind when building your omnichannel experience:

#### Focus on the Customer Experience First

Consumers are more likely to buy if their shopping experience has been personalized along the way, which fits it in perfectly with the customer journey mindset. Personalize every step possible.

Utilize social login (e.g.: login with Google, Facebook, Twitter) to gather insights and build a more in-depth customer profile.



## Create A Seamless Mobile Experience

If most of your business comes through online channels, it's essential that your mobile platforms and websites are optimized. A bad mobile experience can turn away a customer on the first visit, never even giving them a chance to enter into your marketing funnel.

More and more consumers are shopping online either through a mobile device or tablet, and overall time spent on mobile is quickly surpassing that spent on desktop computers. The first step in creating an omnichannel strategy is perfecting the mobile experience. Do this by adapting large visuals, simplified navigation, and an interface that's easy to swipe through.

## Engage with Customers Across All Channels

Perhaps one of the most important aspects of omnichannel marketing is making sure your brand is actively engaging with customers across all mainstream platforms.

This can mean utilizing email campaigns, running giveaways on social media, collecting user data through quizzes, and directly communicating with them through comments and social conversations. Your efforts will not go unnoticed, 67% of people are more likely to buy your product or service if they've previously had a positive interaction with the brand online.





## 2. Identifying issues throughout the journey

As we've discussed in the previous sections of this guide, identifying issues and barriers in the customer journey are crucial to correcting and improving upon them.

However, it's also important to identify underlying issues that all customers may face when attempting to engage with your brand. As you're building your customer journey and going through all aspects of the buying process for yourself, you may pick up on small issues that could have a much bigger effect if fixed.

Some typical issues along these lines can include:

- Slow website loading times
- An inconsistency of branding across different online pages
- Long waits for customer service
- Too frequent email campaigns (bordering on spam!)

There are bound to be inconsistencies and small issues in every business's customer experience. While not the end of the world, it's very important to take the time as you're doing now, to really put yourself in the customer's shoes and identify these barriers and limitations that ultimately may result in them choosing not to purchase.

## 3. Building customer lifetime value

Building a customer lifetime value is one of the most sought-after goals for a marketer. Because honestly, what's better, a one-time product purchase, or a monthly purchase that also brings consistent referrals right to your door.



I think we can all agree that the latter is the more optimal situation, but how do you get there? It starts with customizing the experience prospective buyers go on — this means that you're not just selling to them, but you're consistently providing them with value and educating them on whatever industry you're in, or leading them to the solutions of the problems they may be having regarding the said industry.

The best marketers in the world continue to do this long after that initial sale because they know the value of a long-time customer relationship. Now, this doesn't mean you have to become BFF's with every customer you acquire, but more so including them in all following marketing funnels, and continuing to provide optimal customer service and valuable features.

## 4. Tools to Utilize

The right tools can make most marketing processes even easier, and building your perfect customer journey is no exception. Especially when it comes to quickly visualizing and explaining your customer journey mapping, tools can be your best friend.

Here are a list of a few easy-to-use mapping tools and their features:

### Smaply

Smaply is made specifically for mapping out customer experiences, so it has all the features you need to dive right into the map creation process. Whether it's your first or your 10th, Smaply provides you with an easy to use interface and features. One of the coolest features is the persona creator, providing everything you need to know about a specific customer, just a click away.



## Microsoft Visio

One of the most popular design and flowchart tools, as well as one of the internet's most trusted brands, Microsoft Visio offers a great solution for beginners and experts alike. It's included in the Microsoft Office suite, and it's incredibly user-friendly. This is a great place to start for beginners because you have the ability to make your customer journey maps as simple or as detailed as you like, with no compromise on features and visual assets.

## Gliffy

Looking for a simple, no-frills visual communication platform to start busting out journey maps? Then this may be your solution. Gliffy is a little more simplistic compared to others, but it does the trick. It comes pre-loaded with user-friendly templates and even integrates with various other team and productivity tools, making collaborating as easy as one click.

No matter what tool you choose, or if you choose a tool at all (sticky notes still work!), it's important to keep your process as simplified and clear as possible, in order for you and your team to clearly understand and implement it, as well if any changes are needed to be made in the future.



## Conclusion

No matter how daunting creating and implementing a customer journey sounds, it is completely worth it on all levels. Understanding your customers and knowing what goes through their minds before, during, and after they make a purchase is incredibly valuable data that will allow you to not only acquire more quality customers but retain them longer as well.

Throughout this guide, we've covered the basics of effective customer journeys, why they're important, and the various methods marketers use to visualize them. Additionally, we walked through the individual steps it takes to plan and build an effective customer journey, which to no surprise, covers most aspects of your business!

And finally, we dug a little deeper into the strategies and tools to make this process not only easier but more effective in the long run.

It's important to keep in mind after reading this guide, that building your first customer journey is just a starting point. What are the next steps?

- Clearly brief all team members on your new strategies
- Create new journeys for different segments of your customers
- Implement slowly across all platforms to avoid confusion
- Analyze & optimize every 30-days

Once you've planned and implemented your perfect customer journey, you are well on your way to acquiring more engaged customers, increasing revenue, and decreasing stress along with the time and resources spent managing prospects with no real plan.

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633 17th Street, Suite 1410, Denver, CO 80202 | 866 873 2006 | [www.act.com](http://www.act.com)