

Customer Journey Map Checklist

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*Save this checklist for later! You're going to come back to it time and time again!

Introduction

Many small business owners invest too much in systems and technology that they later discover don't meet their customers' needs. We spend time and money on websites, marketing campaigns, and technology, yet these efforts rarely translate into increased revenue or customers who become raving fans. And throwing away time and money month after month can be mind-numbing.

Solving this problem is relatively easy. You need a [customer journey map](#) based on a simple, effective strategy where your customers come before the systems and technology.

But how do you create a customer journey map? Go through this checklist, and complete this [Customer Journey Map Template](#) by making a copy. Doing some deep thinking about the questions in this checklist will help you create an impactful customer journey. This strategy is used in large corporations, organisations, and businesses worldwide. The size of your business is irrelevant. It's simple, and it will work for you too.

If you're a business owner who wants loyal, repeat customers or an employee who wants to deliver exceptional experiences, this customer journey map checklist will save you enormous hassle. And more importantly, it will save you time and money!

With this checklist, you'll get practical strategies that are easy to implement, and you'll quickly learn which systems, technology or processes are not fit for purpose. Stop wasting money on incidental customer experiences, and create a customer journey that works.

Let's dive in!

Step 1:

Identify the customer who will go on a journey with your business



The first step in building a customer journey is identifying who will go on the journey.

When you truly understand your customers and know them as well as they know themselves, you are more likely to attract the right customers to your business.

Narrowing down who your ideal customer is helps you get a clearer picture of what influences them. You'll learn about their needs, desires, problems and goals.

If you are too general with your messaging and marketing when trying to attract customers, often one of three things can happen:

- Your message doesn't resonate with anyone because it's so broad and vague
- You will attract the wrong clients who later fall through the cracks because they weren't suitable for you in the first place
- It will take you longer to grow your business

To create a clear picture of who will go on this journey, describe your ideal customer by completing the following:

- Give them a name (make them the hero of your story)
- What is their business/occupation?
- What is their average age?
- Typical gender (if relevant)?
- Do they have family (if relevant)?
- What is their level of education?
- What are their hobbies?
- Where are they based? Where do they live?
- What are their interests?
- What motivates them to buy from you?
- What might stop them from buying from you?
- What external things/people influence them?
- What are their internal beliefs about what you do?
- What is their social media platform of choice?
- What is their behaviour like when they engage and interact with your brand?
- How much do they know about what you offer before they engage with you?
- What are their expectations/assumptions in relation to what you offer?
- What is something they are likely to say? A quote perhaps?

Pro Tip: Adjust the questions to suit you, i.e. age - business is established five years. There are several ways you can learn more about your customers. You can do customer surveys, 1-2-1 market research, or even hold a focus group. That information will help you create a brand, marketing and sales strategy that resonates with your ideal clients. And if you have multiple offers and client types, do this exercise for each.

Step 2:

Get clarity on the journey



A customer journey map for one product or service is likely quite different to others in your business. It's helpful to create maps for all of your various offerings.

A customer journey map visually represents how customers interact with your business by mapping out their actions to achieve a goal.

Customer journey mapping helps you better understand the customer relationship, the steps your customers take and the steps you need to take in your business to make the journey as smooth as possible.

When you have crafted a customer journey map, you can structure it to create the most effective and efficient process for your customers at each engagement point, known as customer touchpoints.

If you have an existing customer journey map, you can conduct this exercise to see if customers are experiencing hurdles, whether or not they're achieving their goals or falling off somewhere along the journey.

There's no right or wrong to what your customer journey should look like. It is best practice to review it regularly for customer satisfaction and retention levels, which will help you determine if it's still fit for purpose.

To get clarity on the journey, make sure you do each of the following:

- Choose one product/service/offer to map out at a time
- Determine the problem that your clients are trying to solve with your services
- Display images that illustrate what success looks like for your customer
- Write out a concise statement as to why they want this outcome
- Note down what would frustrate them along the way
- Consider what their expectations are before, during and after engaging with you
- Plot out each engagement the client will have with your brand along the journey
- Identify if there are long time periods between engagements
- Ensure any systems or technology are user friendly
- Set out where your clients will find you before they embark on a journey with you
- Identify areas of the journey you can automate
- Factor how you will add a personal touch throughout the journey
- Think about what your clients might think, feel or say about each engagement
- Factor what action steps the client needs to take at each touchpoint

Pro Tip: Don't let this intimidate you. Start with a high-level overview of the touchpoints. Think in terms of before working with you, during the time they're working with you, and when they're finished working with you. Then, come back and break down what happens during each stage. Remember to include things like invoices, reminders, upsell opportunities, etc.

Step 3:

Get started!



Remember, as you're mapping out the journey, only to include the steps your customers take. You can create a separate map for the behind-the-scenes processes you take to ensure your customer's journey is smooth, known as a process map. I highly recommend you do that once you've done your customer journey map.

Now that you know what's included, nothing is stopping you from creating planned, intentional, differentiated and exceptional experiences.

With 9/10 businesses competing on Customer Experience alone, completing this exercise will help ensure you're on the playing field.

Pro Tip: As you're mapping out this process and reviewing each customer touchpoint, it's helpful to ensure your branding is consistent across each area. And that your messaging is clear throughout. Depending on your business, you could even share your customer journey map with your customers so they can see their progress. Mapping out journeys is not exclusive to customers. You can use this same process for employees.

Sample High-Level B2B Customer Journey

Map with stages and customer thoughts



Pro Tip: This same sample will work for B2C too. Simply change the business to customer. You can make the journey even more transparent by going through every touchpoint from the start to the renewal stage, i.e. you could add in every touchpoint the customer has, email communications, receipts, surveys etc. All you need to get started is a pen and paper! Click the link here to Make A Copy of a template in Google Docs.

Building a successful business full of your ideal clients begins with clarity.

This checklist and template will ensure you've clearly defined your customer's journey, and can apply them to all aspects of your business.

If you complete this checklist, you will identify ways to improve your customer's experience, customer engagement will increase, and your business will grow.

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