Customer journey template

This template follows a consumer-focused marketing model that illustrates the theoretical customer journey toward the purchase of a good or service, as well as post-purchase relationship management. Use it along with your buyer personas to plan how your touchpoints with the customer will align with each stage of their journey.

| **Stage of the buyer's journey** | **Your customer** | **Touchpoints** | **Considerations & pain points** | **What you will do to improve experience** |
| --- | --- | --- | --- | --- |
| **Awareness** | Is made aware of your brand/products. This is your chance to engage and generate interest. | Word of mouth | For example:  They can’t easily find what they’re looking for when searching online.  Maybe you’re currently making calls at this point and this is off-putting. |  |
| Search engine |
| Your website |
| Digital advertising |
| Social media |
| Print media |
| Trade shows |
| **Interest** | Is in the research phase, but now you need to turn that interest into action. | Your website | For example:  Information given on webchat or phone call is inadequate.  Content is weak or irrelevant. |  |
| Email marketing |
| Webinars |
| Video content |
| Webchat |
| Calling you |
| Sign-up forms |
| **Consideration** | Is evaluating your product and comparing it with competitors or other options. They need information to make a rational choice on whether the product is right for them. They will try to educate themselves, but you need to be there to guide them and provide them with the information they need. | Free trials | For example:  Conflicting opinions with other stakeholders in the company.  Unsure whether the investment will deliver ROI. |  |
| Salesperson contact |
| In-person pitch or presentation |
| Company accreditations |
| Price and contract information |
| Testimonials |
| Case studies |
| Request for information (RFI) |
| Request for proposal (RFP) |
| **Purchase** | Has made the decision to buy and now is the time to follow through on your promises by delivering the product in a way that builds on your brand values and impresses your new client. | Order process | For example:  Internal sign-off process is complex.  Onboarding support is inadequate. |  |
| Contract negotiation |
| Product delivery/installation |
| Initial product training |
| Packaging and documentation |
| Onboarding support |
| Email updates (new features, patches etc) |
| VIP/preferred client programs |
| User communities |
| Technical support |
| Account management |
| Check-in calls from sales reps/AMs |
| Ongoing customer satisfaction monitoring |
| **Retention** | You can encourage customer retention and repeat purchasing/upselling through a proactive relationship management program and great customer service. | Ongoing product training | For example:  Customer service is slow to respond, causing frustration and operational delays.  AMs/reps lack adequate product knowledge. |  |
| Email updates (new features, patches etc.) |
| VIP/preferred client programs |
| User communities |
| ABM |
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| **Advocacy** | A great experience as a customer means they shout about your brand! | Testimonials & case studies | For example:  Poor experience means they leave negative reviews. |  |
| Social media |
| Online reviews |
| Referral program |