

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 Search engine Your website Digital advertising Social media Print media Trade shows	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.	

Interest	Is in the research phase, but now you need to turn that interest into action.	<p>Your website</p> <p>Email marketing</p> <p>Webinars</p> <p>Video content</p> <p>Webchat</p> <p>Calling you</p> <p>Sign-up forms</p>	<p>For example:</p> <p>Information given on webchat or phone call is inadequate.</p> <p>Content is weak or irrelevant.</p>
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.	<p>Free trials</p> <p>Salesperson contact</p> <p>In-person pitch or presentation</p> <p>Company accreditations</p> <p>Price and contract information</p> <p>Testimonials</p>	<p>For example:</p> <p>Conflicting opinions with other stakeholders in the company.</p> <p>Unsure whether the investment will deliver ROI.</p>

		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.	<ul style="list-style-type: none"> Order process 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 	<p>For example:</p> <ul style="list-style-type: none"> Internal sign-off process is complex. Onboarding support is inadequate.

		<p>Technical support</p> <p>Account management</p> <p>Check-in calls from sales reps/AMs</p> <p>Ongoing customer satisfaction monitoring</p>	
Retention	<p>You can encourage customer retention and repeat purchasing/upselling through a proactive relationship management program and great customer service.</p>	<p>Ongoing product training</p> <p>Email updates (new features, patches etc.)</p> <p>VIP/preferred client programs</p> <p>User communities</p> <p>ABM</p> <p>Technical support</p> <p>Account management</p>	<p>For example:</p> <p>Customer service is slow to respond, causing frustration and operational delays.</p> <p>AMs/ reps lack adequate product knowledge.</p>

		Check-in calls from sales reps/AMs	
		Ongoing customer satisfaction monitoring	
Advocacy	A great experience as a customer means they shout about your brand!	Testimonials & case studies Social media Online reviews Referral program	For example: Poor experience means they leave negative reviews.
