

Customer Journey Planner Templates

pink elephant media

Thanks for downloading this resource!

How to use this template:

Included in this resource are a number of different customer journey maps, including:

- Buyer's Journey Template
- Current State Template
- Lead Nurturing Mapping Template
- Future State Template
- Customer After sales to prevent churn
- Customer Support Blueprint Template

[Prompts in Brackets]: These are intended for you to erase and fill in with information for your specific project, such as project name or a due date.
Once you're ready to begin, delete the first three slides and start filling out your info below. Remember, you can add/edit/delete any wording or sections you see fit for your projects.

Lets get started >



Creating a Customer Journey Map

What to learn more? Pink Elephant Media training platform is designed to help our clients get the most out of their websites.

Completing this lesson will help you:

- Better understand your customers
- Improve your customer experience

Understanding how to build sales funnels

A sales funnel is the step that a potential customer will make before becoming one. Understanding the way your customer reacts will allow us to understand what optimisation is required at each step. The first step, is to take a product or a service you offer and think about the message. Below are some key stages on what a client is looking for. Remember good competitor research is required here. If you don't stand out from the herd how can you compete?



What are you offering?

Why should they care?

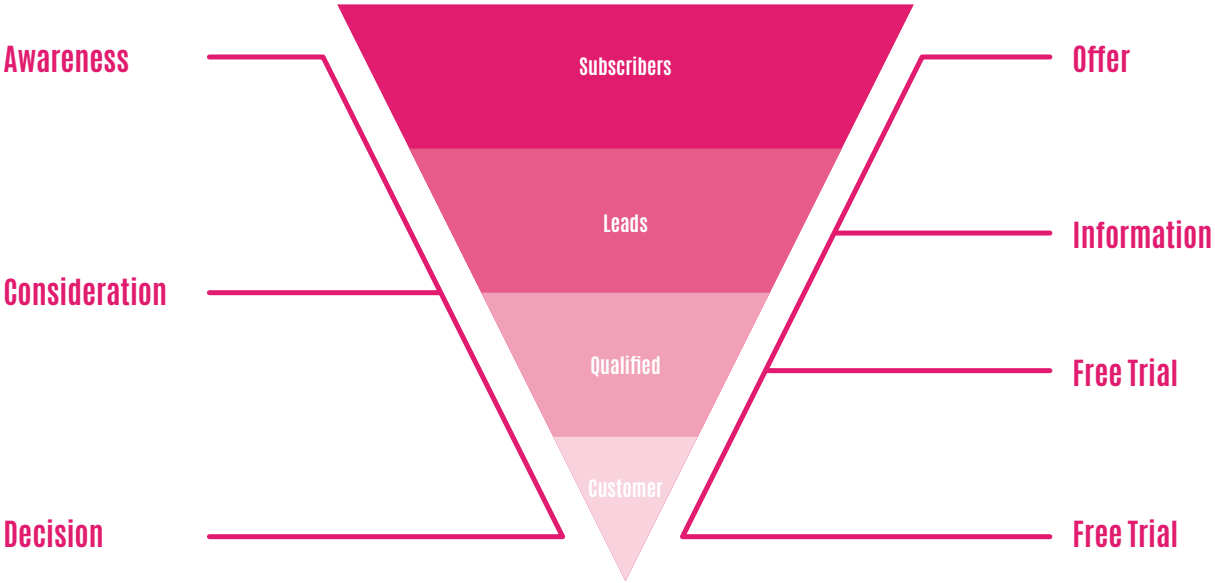
What proof can you offer?

How can you relay their fears?

Remember: Your potential client does not care about you. They care about what they get when they use your product or service.

Conversion Funnel

Here is an example of a conversion tunnel. This should have actions tied to each stage



Conversion steps a prospect takes in becoming a customer

1 Discovery

How will the prospect learn about you? e.g. PPC, LinkedIn Marketing, Social Media, Marketing.

2 Engagement

What resources can be utilised to prove to a client you understand their need and build trust. e.g. downloads and articles

3 Connect

Prospect given ways in which to connect. e.g. Follow on social media and sign up to free trail

4 Sale

After finding value in the offer given at the connect stage in the funnel, they become a paying customer



Remember: It is important when deciding upon the steps that prospects will enter the funnel at different stages and will convert at different times. However, understanding the prospects journey will ensure that the key stages are optimised. This will allow you to check:

1. What part of the funnel is failing or working well
2. What the landing page requirements will be
3. What part of the funnel requires further optimisation

Funnel Stage	eCommerce	Other	Your Business
Top of the funnel	Email Marketing Social media Click through rates Clicks of ads Affiliate Marketing SEO	Click through rate Subscriptions Downloads Sign up to newsletter or blog	Unique Page Visits Pages per visit Bounce Rate Time Spent on website Social Media Shares Downloads
Top to Mid of the funnel	Return visits to website Number of pages viewed Reading Product Reviews	Visits to pricing page Downloads on ebooks Case Studies read Number of pages viewed	Return visitor rate Pages per visit Time spent on the website Bounce rate
Lower mid of the funnel	Offers Promotions Wishlists Customer service enquiries	Requesting more details Phone call Product demo Free trial	Completed lead forms Calls Take up of offer
Bottom of the funnel	First time purchase Repeat purchase	Purchase Signup	Average order value No of transactions No of purchases Lifetime value of client

Funnel Stage	Customer Mindset	Customer Action	Success Metric
Top of the funnel	What do you do?	Discovering your brand Conducting their own research Collecting information	Unique Page Visits Pages per visit Bounce Rate Time Spent on website Social Media Shares Downloads
Top to Mid of the funnel	Why should I care?	Conducting indepth research Cost analysis Comeptitor Research	Return visitor rate Pages per visit Time spent on the website Bounce rate
Lower mid of the funnel	Why should I believe you?	Requesting more details Phone call Product demo / Free trial	Completed lead forms Calls Take up of offer
Bottom of the funnel	Where do we begin?	Purchase Signup	Average order value No of transactions No of purchases Lifetime value of client

Customer Journey: Buyer's Journey	Awareness Stage	Consideration Stage	Decision Stage
What is the customer thinking or feeling?	[Your info here]	[Your info here]	[Your info here]
What is the customer's action?	[Your info here]	[Your info here]	[Your info here]
What or where is the buyer researching?	[Your info here]	[Your info here]	[Your info here]
How will we move the buyer along his or her journey with us in mind?	[Your info here]	[Your info here]	[Your info here]

Customer Journey: Current State	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
What is the customer thinking or feeling?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
What is the customer's action?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
What is the customer's touchpoint with the business?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
What do we want to change about this step?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
How and/or why will we make this change?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]

Customer Journey: Lead Nuturing	Stranger	Subscriber / Lead	MQL	Oppertunity / Demo	Deal Closed to Go Live
What is the customer thinking or feeling?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
Who from our company is the lead hearing from or talking to?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
What content from our company is the lead interacting with?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
What can we do to expe-dite this process?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
What can we do to make the lead more comforta-ble in decision making?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]

Customer Journey: After Sales	Popular Churn Reason #1	Popular Churn Reason #2	Popular Churn Reason #3	Popular Churn Reason #4	Popular Churn Reason #5
What did the customer experience?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
What is the customer feeling after this/these incidents?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
Why does this ultimately cause the customer to churn?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
How can we improve this experience to reduce churn?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]

Customer Journey: Customer Churn	Popular Churn Reason #1	Popular Churn Reason #2	Popular Churn Reason #3	Popular Churn Reason #4	Popular Churn Reason #5
What did the customer experience?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
What is the customer feeling after this/these incidents?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
Why does this ultimately cause the customer to churn?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]
How can we improve this experience to reduce churn?	[Your info here]	[Your info here]	[Your info here]	[Your info here]	[Your info here]

COMPANY GOALS

This is an example. Please delete the content and make it you own.

STAGE	AWARENESS	CONSIDERATION	DECISION		DELIVERY & USE			LOYALTY & ADVOCACY	
CUSTOMER ACTIVITIES	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]
CUSTOMER GOALS	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]
POINTS OF FRICTION What can we do to reduce the friction?	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]
TOUCHPOINTS	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]
BUSINESS GOAL	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]
KPIs	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]
ORGANISATIONAL ACTIVITIES	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]
RESPONSIBLE	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]
TECHNOLOGY SYSTEMS	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]	[Text goes here]