

EXPERIENCE THROUGH EXPERIENCE

To often, as digital leaders and marketers, we get so close to the digital experiences we have created for our customers and so entrenched in delivering the latest phase or feature that we seldom step back and take a walk through our holistic customer experience as we created.

By stepping into your customers' shoes and navigating your digital journey as they would, you can uncover valuable insights into both the strengths and weaknesses of your current setup. This exercise is crucial for identifying actionable areas for improvement and setting the stage for a truly transformative customer experience.

1. IDENTIFY THE CUSTOMER JOURNEY POINTS, INCLUDING THE CHANNELS AND TOUCHPOINTS, THAT YOUR CUSTOMERS USE TO INTERACT WITH YOUR BUSINESS.

2. LIST THE CUSTOMER GOALS, NEEDS, AND PAIN POINTS THAT YOUR CUSTOMERS HAVE AT EACH STAGE OF THE JOURNEY.

3. MAP THE CURRENT STATE OF YOUR BUSINESS TO THE CUSTOMER JOURNEY, IDENTIFYING GAPS AND OPPORTUNITIES FOR IMPROVEMENT.

4. DEVELOP A STRATEGIC PLAN TO ADDRESS THE IDENTIFIED GAPS AND OPPORTUNITIES, PRIORITIZING INITIATIVES AND ASSIGNING RESPONSIBILITIES.

INSTRUCTIONS

Within the template to the right, we have layered in the questions you need to consider under each stage and against each row to help guide you through constructing the customer roadmap.

In addition, you must also consider:

- Within Row 1, consider your own customer lifecycle and amend the stage names, and number of stages if necessary, to reflect your own customer lifecycle.
- Within Row 2, consider the steps within every stage. Some stages may have just one step while others will have multiple steps. While the template maps out three, you can have as many steps as you need under every stage. But be careful to not go too granular too quickly. This is intended to be a high-level overview.
- Whenever possible, leverage analytics and customer research to guide your inputs for Rows 2 to 5. You need to write this from the view of the customer, not from traditional perceptions of the customer.
- Ensure you have already established your Objective & KPI row so you can layer this information into Rows 6 & 7.

ADDITIONAL RESOURCES

User Testing Resources
<https://www.usertesting.com/resources/08-how-to-user-test>
 Practical guides on how to gather customer insight.

User Testing Templates
<https://www.usertesting.com/resources/10-templates>
 Templates and tools for capturing feedback and insight.

		STAGE NAME (e.g., Acquisition)			STAGE NAME (e.g., Consideration)			STAGE NAME (e.g., Decision)			STAGE NAME (e.g., Service)			STAGE NAME (e.g., Loyalty & Advocacy)		
CUSTOMER	STAGE															
	CUSTOMER ACTION	What is the customer doing? <i>(e.g., Viewing product page, adding to cart)</i>	What is the customer doing?	What is the customer doing?	What is the customer doing? <i>(e.g., Conducting research, comparing features and pricing)</i>	What is the customer doing?	What is the customer doing?	What is the customer doing?	What is the customer doing? <i>(e.g., Signing up for trial, making a purchase)</i>	What is the customer doing?	What is the customer doing?	What is the customer doing?	What is the customer doing? <i>(e.g., Using the service, providing feedback, sharing reviews, referring friends)</i>	What is the customer doing?	What is the customer doing?	
	CUSTOMER GOAL	What does the customer want? <i>(e.g., Find a solution to their problem, explore new features)</i>	What does the customer want?	What does the customer want?	What does the customer want? <i>(e.g., Reduce time spent on support)</i>	What does the customer want?	What does the customer want?	What does the customer want?	What does the customer want? <i>(e.g., Receive a high-quality product)</i>	What does the customer want?	What does the customer want?	What does the customer want?	What does the customer want? <i>(e.g., Continue to use the service, explore new features)</i>	What does the customer want?	What does the customer want?	
	CUSTOMER EMOTION	How are they feeling? <i>(e.g., Excited, frustrated, confused, overwhelmed)</i>	How are they feeling?	How are they feeling?	How are they feeling? <i>(e.g., Frustrated, disappointed)</i>	How are they feeling?	How are they feeling?	How are they feeling?	How are they feeling? <i>(e.g., Satisfied, happy)</i>	How are they feeling?	How are they feeling?	How are they feeling?	How are they feeling? <i>(e.g., Grateful, loyal)</i>	How are they feeling?	How are they feeling?	
	CUSTOMER TOUCHPOINT(S)	Where are they performing these activities? <i>(e.g., Website, mobile app, social media)</i>	Where are they performing these activities?	Where are they performing these activities?	Where are they performing these activities? <i>(e.g., Support chat, email, phone)</i>	Where are they performing these activities?	Where are they performing these activities?	Where are they performing these activities?	Where are they performing these activities? <i>(e.g., Product page, checkout, email)</i>	Where are they performing these activities?	Where are they performing these activities?	Where are they performing these activities?	Where are they performing these activities? <i>(e.g., In-app notifications, push notifications)</i>	Where are they performing these activities?	Where are they performing these activities?	
	OBJECTIVES	What objective are we addressing at this touchpoint? <i>(e.g., Increase conversion rate, reduce churn)</i>	What objective are we addressing at this touchpoint?	What objective are we addressing at this touchpoint?	What objective are we addressing at this touchpoint? <i>(e.g., Improve customer satisfaction)</i>	What objective are we addressing at this touchpoint?	What objective are we addressing at this touchpoint?	What objective are we addressing at this touchpoint?	What objective are we addressing at this touchpoint? <i>(e.g., Increase revenue, reduce support tickets)</i>	What objective are we addressing at this touchpoint?	What objective are we addressing at this touchpoint?	What objective are we addressing at this touchpoint?	What objective are we addressing at this touchpoint? <i>(e.g., Increase customer loyalty, reduce churn)</i>	What objective are we addressing at this touchpoint?	What objective are we addressing at this touchpoint?	
	KPI	How will you measure progress against the objective? <i>(e.g., Conversion rate, time to purchase)</i>	How will you measure progress against the objective?	How will you measure progress against the objective?	How will you measure progress against the objective? <i>(e.g., Customer satisfaction score)</i>	How will you measure progress against the objective?	How will you measure progress against the objective?	How will you measure progress against the objective?	How will you measure progress against the objective? <i>(e.g., Revenue, support tickets)</i>	How will you measure progress against the objective?	How will you measure progress against the objective?	How will you measure progress against the objective?	How will you measure progress against the objective? <i>(e.g., Net Promoter Score, churn rate)</i>	How will you measure progress against the objective?	How will you measure progress against the objective?	
	TEAMS INVOLVED	Which teams are involved from the business to power this touchpoint? <i>(e.g., Marketing, Sales, Development)</i>	Which teams are involved from the business to power this touchpoint?	Which teams are involved from the business to power this touchpoint?	Which teams are involved from the business to power this touchpoint? <i>(e.g., Marketing, Sales, Development)</i>	Which teams are involved from the business to power this touchpoint?	Which teams are involved from the business to power this touchpoint?	Which teams are involved from the business to power this touchpoint?	Which teams are involved from the business to power this touchpoint? <i>(e.g., Marketing, Sales, Development)</i>	Which teams are involved from the business to power this touchpoint?	Which teams are involved from the business to power this touchpoint?	Which teams are involved from the business to power this touchpoint?	Which teams are involved from the business to power this touchpoint? <i>(e.g., Marketing, Sales, Development)</i>	Which teams are involved from the business to power this touchpoint?	Which teams are involved from the business to power this touchpoint?	
OUR RESPONSE	What does our need to do to enable the customer goal? <i>(e.g., Improve website navigation)</i>	What does our need to do to enable the customer goal?	What does our need to do to enable the customer goal?	What does our need to do to enable the customer goal? <i>(e.g., Improve customer support response times)</i>	What does our need to do to enable the customer goal?	What does our need to do to enable the customer goal?	What does our need to do to enable the customer goal?	What does our need to do to enable the customer goal? <i>(e.g., Offer personalized product recommendations)</i>	What does our need to do to enable the customer goal?	What does our need to do to enable the customer goal?	What does our need to do to enable the customer goal?	What does our need to do to enable the customer goal? <i>(e.g., Offer loyalty rewards)</i>	What does our need to do to enable the customer goal?	What does our need to do to enable the customer goal?		