

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.	Your website	For example:
		Email marketing	Information given on webchat or phone call is inadequate.
		Webinars	
		Video content	Content is weak or irrelevant.
		Webchat	
		Calling you	
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.	Sign-up forms	
		Free trials	For example:
		Salesperson contact	Conflicting opinions with other stakeholders in the company.
		In-person pitch or presentation	
		Company accreditations	Unsure whether the investment will deliver ROI.
		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:
		Contract negotiation	Internal sign-off process is complex.
		Product delivery/installation	Onboarding support is inadequate.
		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:
		Email updates (new features, patches etc.)	Customer service is slow to respond, causing frustration and operational delays.
		VIP/preferred client programs	AMs/ reps lack adequate product knowledge.
		User communities	
		ABM	
		Technical support	
		Account management	

		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	For example:
		Social media	Poor experience means they leave negative reviews.
		Online reviews	
		Referral program	