



Customer Journey Mapping

The importance of early CSM involvement

Lunch and learn June 27th, 2024

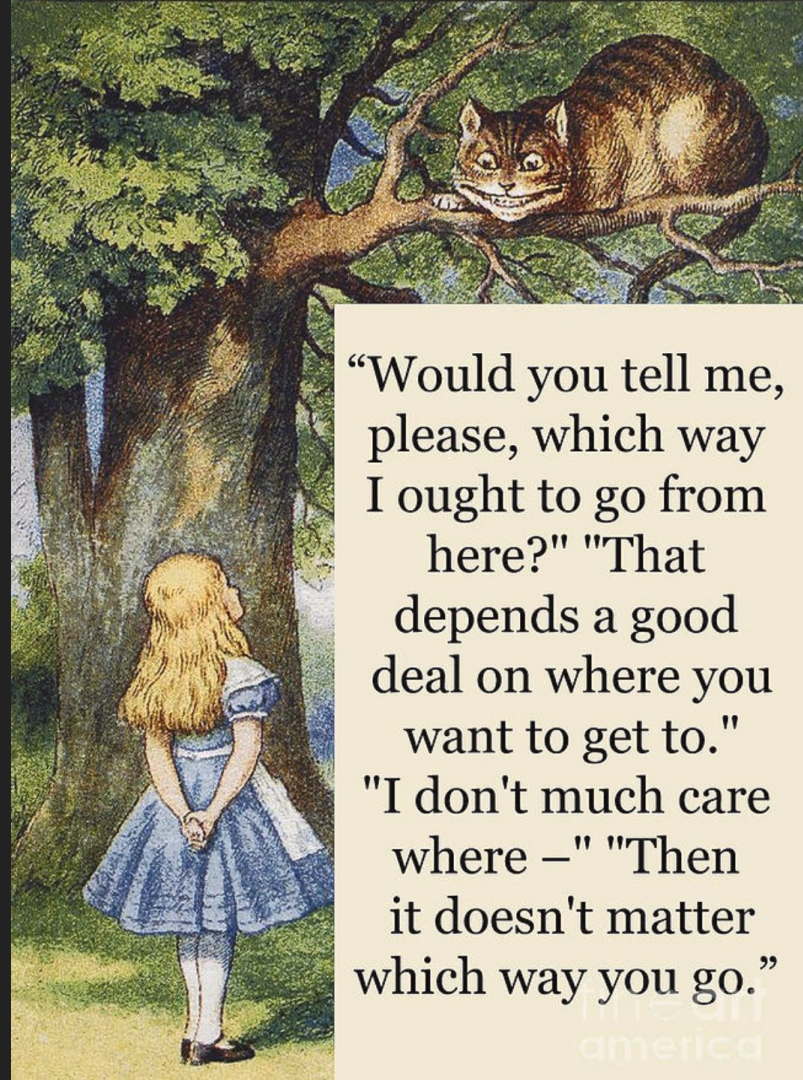
Why map the Customer Journey?

Are customers on a journey even if we don't map it out?

Are we ever frustrated—feeling like we are more reactive than proactive?

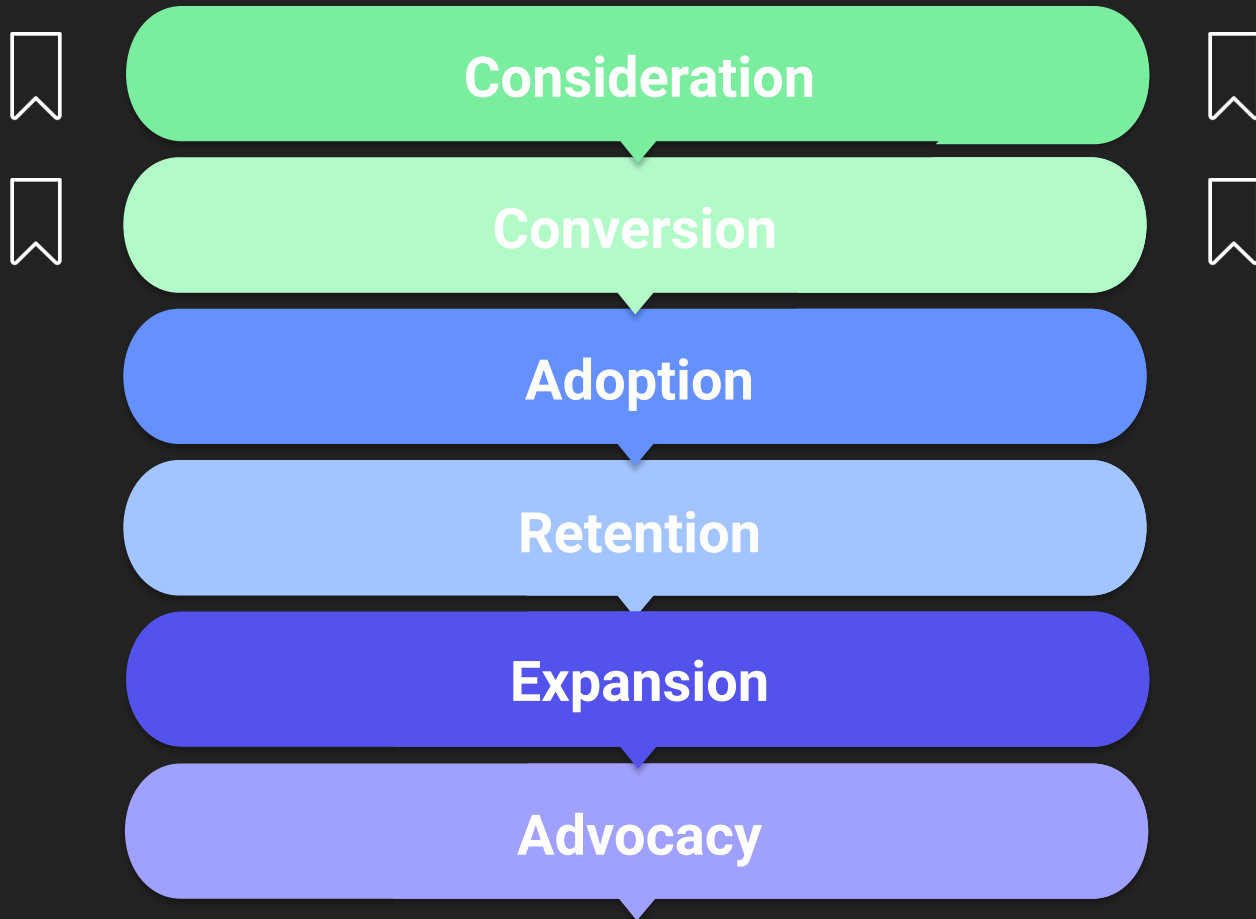
Do we ask ourselves: “Why can't all customers be like this?”

Is it clear to internal and external stakeholders what we do?



“Would you tell me, please, which way I ought to go from here?” “That depends a good deal on where you want to get to.” “I don't much care where –” “Then it doesn't matter which way you go.”

Customer Journey Mapping: Ideal Customer Outcomes



Customer Journey by Segment



	Consideration	Conversion	Adoption	Retention	Expansion	Advocacy
Strategic	CS available Execs available	Welcome Letter LinkedIn Connection	Customized Onboarding Standardized 30,60,90 Focused on CRM Integration & KPI Reporting Community and GUIDEu Onboarding 6 Month Check In	Minimum Monthly Cadence Semi Annual Performance & Planning Internal Monthly Planning Quarterly Executive Check In Onsite or Conference Connection Focus on Multi Year Terms	Semi Annual Performance & Planning Internal Monthly Planning Quarterly Executive Check In Workspaces Report Builder New Division User Adds	Joint Events Webinars Case Studies Reference Calls In-App Refer & Earn Review Site Campaigns
High Touch	CS available	Welcome Letter LinkedIn Connection	Customized Onboarding Standardized 30,60,90 Focused on CRM Integration & KPI Reporting Community and GUIDEu Onboarding 6 Month Check In	Minimum Quarterly Cadence Annual Performance & Planning Internal Monthly Planning Semi Annual Executive Check In Focus on Multi Year Terms	Annual Performance & Planning Internal Monthly Planning Workspaces Report Builder New Division User Adds	Joint Events Webinars Case Studies Reference Calls In-App Refer & Earn Review Site Campaigns
Low Touch		Welcome Letter LinkedIn Connection	Customized Onboarding Standardized 30,60,90 Focused on CRM Integration & KPI Reporting Community and GUIDEu Onboarding 6 Month Check In	Minimum Semi Annual Cadence Annual Performance & Planning Internal Monthly Planning Semi Annual Director Check In Focus on Multi Year Terms	Annual Performance & Planning Internal Monthly Planning Platform Upgrades Report Builder New User Adds Campaign Based Outreach	Webinars Case Studies Reference Calls In-App Refer & Earn Review Site Campaigns
Maintain		Welcome Letter LinkedIn Connection	Customized Onboarding Standardized 30,60,90 Focused on Native Integrations Community and GUIDEu	Minimum Annual Cadence Automated Performance Review	Platform Upgrades New User Adds Campaign Based Outreach	In-App Refer & Earn Review Site Campaigns

Why it Matters

Importance of Early CS Involvement

Reduced Time to Value

Improved customer
outcomes

Consistency in customer
lifecycle

Increased expansion
opportunities and CLTV

80%

of customers now consider the experience a company provides to be as important as its products and services.

79%

of customers expect consistent interactions across departments, yet 55% say it generally feels like they're communicating with separate departments rather than one company.

How to Get Started

Strategies for Involvement

Assign CSM in CRM during final pre-sales stage

Include CSM as a tactic to close strategic deals

Track multi-threaded deals to prove increased close rate, velocity, and retention.

The reason we chose you was because every meeting we had pulled new members of the team in. Whether it was Mark, Cheyanne, or Dave.

By the time we signed we felt we knew the GUIDE team and had a full company to support us. No other vendor gave us an experience like this.

- Julie Dawson, Commport

"While we're looking for software, really we're also looking for more of a partnership as we try to figure this out ourselves."

-VP of Implementation

Integrate for Ease

Tools and Technologies



Assign CSM in CRM during final pre-sales stage

Invite to Kick Off, Key Meetings and Hand Off

Integrate KPIs into your CRM or CSP

Increase visibility and assign “pulse checks”

Success
CSM - [View Tasks](#)



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0 / 0 Active



1 Planned

[View Tasks](#)

[Manage Watchers](#)

Provider	4 months ago
Overview Emails:	On
Task Emails:	On
Project View:	Full

Project Management
Training Manager - [View Tasks](#)



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6 Planned

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Project Management
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1 Planned

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[Manage Watchers](#)

Provider	5 months ago
Overview Emails:	On
Task Emails:	On
Project View:	Full

Team member



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0 Planned

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Provider	3 months ago
Overview Emails:	On
Task Emails:	On
Project View:	Full

“Who is Genevieve, and when we will meet her?” - Follett

Does it Always Work?

Overcoming Challenges

Large book size

CSM bandwidth won't allow

Pooled success model

New hire will take the account

What else?

“Every business has to decide where they want to compete — in the price wars or the experience wars. I prefer to compete on the basis of an outstanding customer experience.”


— John DiJulius, John DiJulius Group

A blue circle with a white center, containing the text 'Create a map'.

Create a map

Make your Customer Journey Map customer facing. Is the Sales team trained on how to present it? Do they share it in the sales cycle?

What next?

A green circle with a white center, containing the text 'Involve CSMs early'.

*Involve CSMs
early*

Involve your customer facing team pre-signature. Have them share success stories of similar customers and collect desired outcomes from the prospect. Automate.

Join Us for Future Lunch & Learns on Customer Journey Mapping

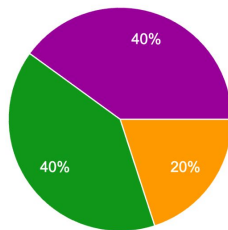
- Dates Coming Soon -



Survey says...

Does your company have a customer journey map?

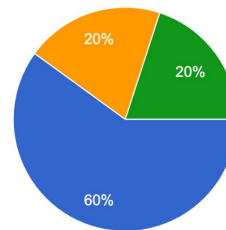
5 responses



- Yes - We use it across teams and everyone understands the value
- Yes - Our Customer Success team uses it and understands its value
- Yes - We have one but it is not actively used or needs reworking
- Maybe - I'm not sure but would like to see one
- No - Not that I'm aware of
- No - We had one, but stopped using it

Who is responsible for onboarding customers?

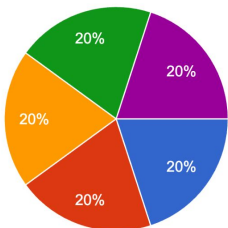
5 responses



- Dedicated onboarding team
- Customer Success Manager
- Developer Services Team - the same team is responsible for Implementation and Customer Success.

When are your customers typically introduced to Customer Success?

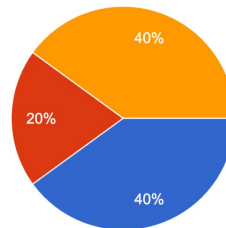
5 responses



- During the sales process
- As part of the kick off
- Once the customer has reached go-live
- Usually part of kick-off but experimenting intro'ing CS with high priority sales / paid pilots.
- We currently do not have a deliberate Customer Success conversation with our clients

What is your Customer Success model?

5 responses

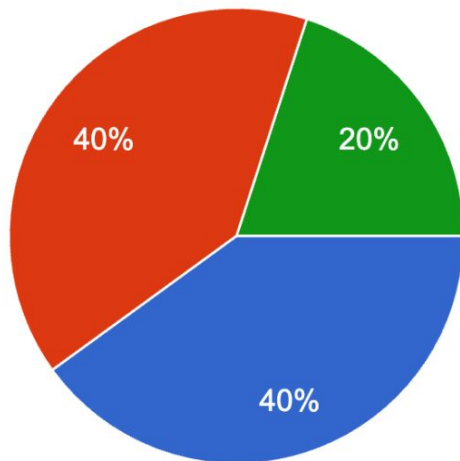


- Named Customer Success Manager
- Pooled Customer Success
- Both - Based on segmentation

Survey says...

Where does Customer Success sit within your company?

5 responses



- Revenue
- Operations
- Customer
- We do not have a dedicated Customer Success team. Our Developer Services team manages everything from onboarding to Customer Success, and straddles revenue/marketing/operations.