

## Customer's Journey Worksheet for Businesses

The customer's journey, also called the sales funnel or the buyer's journey, is used to describe the process in which a customer makes a purchase or a decision. The goal is to understand your audience, what solutions they are looking for, what answers they need, and the goals they have so you can provide them with information to make the right decision. This knowledge helps you create a content strategy to provide them with just the right information for where they are in their journey.

Your product or service will determine which stage of the funnel your customers will spend the most time in. For example, if you offer a long-term or ongoing service, your customers may spend more time in the Awareness stage researching how to meet their needs. Whereas a product-based company can expect customers to spend more time in the Consideration stage. And the more costly your product, the more time they will spend here. It is the unique content you will develop that will guide and support them toward a decision.

### Top of the funnel: Awareness

During the **Awareness** stage, customers are trying to solve a problem, identify the challenge, answer a question, recognize a need, or seek an

opportunity they want to pursue. They also decide at this stage whether or not the goal or challenge should be a priority—or if they can take no action at all. They need informative or educational content to guide them toward an answer and are often open to solutions.

To fully understand the Awareness stage for your customer, ask yourself:

- How do your customers describe their goals or challenges?
- How do customers educate themselves on these goals or challenges?
- What are the consequences of inaction by the customer?
- Are there common misconceptions customers have about addressing the goal or challenge?
- How do customers decide how to prioritize their goal or challenge?
- Is there a possible trigger that might push them from the awareness stage to the consideration or decision stage?

**Awareness stage content examples:** blog posts, social media content, eBooks, checklists, tip sheets, how-to videos, educational webinars, surveys, or quizzes. Providing information is the content goal in this stage.

## **Middle of the funnel: Consideration**

During the **Consideration** stage, customers know they have a problem they must solve. They have clearly defined the goal or challenge and are committed to addressing it. You have their attention! They evaluate the different approaches or methods available to pursue the goal or solve the challenge. They are looking for the best solution. In the last stage, they will be looking for a product or service, but now is your chance to show them

why your business's offerings are the best fit for their needs. After all, to have delighted customers and to retain them, you want to match your strengths with their goals when that is an option. Ask yourself:

- What categories of solutions do customers investigate?
- How do customers educate themselves about the various categories?
- How do customers perceive the pros and cons of each category?
- How do customers decide which category is right for them?

**Consideration stage content examples:** videos, business stats, infographics, customer testimonials, or products offered. Nurturing and building trust is the content goal in this stage.

## **Bottom of the funnel: Decision/Purchase**

In the **Decision** stage, customers have already decided they will select a solution, but they may not choose you. It might just take providing a call to action (CTA) for them to make their choice. For example, they could write a pro/con list of specific offerings and then decide on the one that best meets their needs. So, the right content and an uncomplicated CTA could cinch the deal. Questions you should ask yourself to define the Decision stage are:

- What criteria do customers use to evaluate our available offerings?
- When customers investigate our business's offerings, what do they like about it compared to other choices? What concerns do they have with our offerings?

- Who needs to be involved in the decision? For each person involved, how does their perspective on the decision differ?

**Decision stage content examples:** company overview, eBook, virtual tours, videos, customer testimonials, and contract forms. Making the advantages clear, removing doubts, and making the process easy is the goal at this stage.



How does understanding the customer's journey impact how you develop your inbound marketing strategies? By understanding your customers' needs (using a well-developed persona), you can provide them with the information, answers, or solutions that meet their needs at each stage of their journey.

For example, using the scenario in the above image, if your prospective customer is only thinking about using your installation services, but you only provide a pricing page on your website, you are unlikely to convince them to take action. You will have failed to convince them that your installation and then ongoing maintenance service will offer them value, answer their questions, or to move them toward selecting your business. In fact, they probably won't even find you.

However, if your website provides an informative blog article, checklist, or report about how to choose the right service for their specific needs, they are likely to give you their email address to get that information. If you create targeted Facebook ads for your existing clients and they share that information, or if a local search brings up your content targeting the concerns associated with installing a new heat pump, your chances of being considered just increased exponentially.

You can then follow it up with additional information, discuss the pros of the types of services your business offers, and provide testimonials from happy clients .

Now, complete your own strategy for developing content for each of the prospective customers (and their personas) using the form below. You'll develop one for each persona you are targeting this year. Start with one, and add additional strategies as time and resources permit.

**Use our worksheet to create your company's content creation strategy.**



# Customer's Journey Content Worksheet

## Meeting your customers where they are in their journey

Once you have created personas that let you understand your customer/buyer needs, you can begin to select and produce information that will meet the various personas' requirements. (Get your persona worksheet if you haven't created them yet.) While each persona may have different interests and goals, you can address their needs once you understand them.

### Awareness

It is likely that customers are unaware of your company or its strengths when they start their search. You need to show them how your company can help meet their requirements and remove problems. You need to establish your business as the expert in the areas of your greatest strength. Some ways to offer the type of information that can help your prospective customers include:

- **Website redesign:** Take a look at your website, and make sure every page supports your goals and contains content and keyword phrases for the topics your prospective customers are searching. Make sure your site is attractive, intuitive, current, and engaging. If you haven't done this, make content creation for inbound marketing your #1 priority.

- **Blog posts:** Start a blog and populate it with solutions, support, and proofs that will help potential customers decide on your service or product.
- **Social media posts:** Assure that a percentage of your posts inform those personas you've targeted. Link to website articles, blog posts, or other downloads you've created.
- **Research studies:** Include links to studies and research that support your methods or confirm your product's quality.
- **eBooks:** Create content in the form of eBooks, guides, checklists, and other PDF downloads that provide comprehensive information in an area of your expertise.

Now, it's your turn. Select one of the personas you developed and use this worksheet to create inbound marketing content to assist that prospective customer through their journey.

**What are your top three priorities to help your selected persona on their customer journey?**

Content creation priorities (used to capture email addresses):

#1: \_\_\_\_\_

#2: \_\_\_\_\_

#3: \_\_\_\_\_

## Consideration

Prospective customers now understand their needs or the problem they wish to solve and are considering their options. They might be aware of your school, but they are still not committed to a decision. Your goal is to help them make an evaluation, compare options, and weigh the pros and cons. You can provide this information through a persona-targeted email nurture campaign.

Some ways to offer the valued information that can help your prospective customers include:

- **Videos:** Show video of people using your product or of how the product is manufactured. Your videos should let your prospective customers see how they might benefit from or use your product.
- **Website:** Create a robust area on your website that highlights your successes, business recognition, and includes review/testimonials from happy customers.
- **Downloads:** Develop valuable content that clients can use as a guide. Consider reports like “How to help your company stand out from the crowd” or “How blog content establishes your credibility.” Create checklists such as “What to ask your web developer before signing a contract?” or “What to look for in a web designer”

Based on the persona you selected above, write three projects you need to create content for, targeting those in this stage of the customer’s journey.



Content creation topics:

#1: \_\_\_\_\_

#2: \_\_\_\_\_

#3: \_\_\_\_\_

## Decision

This is the stage in the customer's journey when they are ready or forced to make the buying decision. Now is the time to provide content that highlights your specific company's value, talk about your competitive advantages, and provide specifics about what makes your business or product better than the other options they may be considering.

Some ways to offer the valued information that can help your prospective customers include:

- **Comparisons:** Use infographics, stats, or any other metric that fits your strengths and persona requirements. These can be prominent on the website, used in marketing videos, touted through quotes from clients and customers, or converted into case studies. Yes, now is the time to tout your business's strengths and values. Remember, you want the right customers (or employees), so highlight the strengths your ideal customers are seeking.

- **Testimonials:** Consider creating videos to share your testimonials (these have a greater impact than just text). Also, consider using testimonial quotes as graphic elements throughout your website. Link to

videos and written testimonials through social media posts and the marketing area of your website.

● **Calls to action:** Each stage should require a call to action (CTA), like a form to collect an email so your prospective customer can download the information they're looking for (your content "gift"). At this stage, you will want to assure that these forms are easy to complete and submit. And once they have made the decision, avoid frustrating them with a difficult or complicated buying stage.

Using the same persona you selected above, write down which projects you need to streamline or the needed content that will help them complete this stage of the customer's journey.

Persona

Name: \_\_\_\_\_

Persona need or interest targeted: \_\_\_\_\_

Content creation topics:

#1: \_\_\_\_\_

#2: \_\_\_\_\_

#3: \_\_\_\_\_

## **How did you do?**

Put these tasks into action, and then select another persona and create a campaign targeting their goals. Don't try to tackle too many at once, but through consistent application, you will soon have a dynamic, powerful inbound marketing system in place for your business.