

# Customer Journey Planning Worksheet

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Print this set of worksheets and brainstorm on your customer experience with these discussion points

Cross-channel marketing, 1-to-1 content, and personalised engagement with your customers are the new norm. You're committed to taking your customers on a meaningful journey with your brand, but with so many potential paths to take, it's easy to feel like you're lost in the woods. How can you get started?

Use this workbook to establish your current business challenges, identify pain points, and recognise the moments that matter most to your customer and your organisation. Start thinking about new ways to look at your customers' journeys with your brand, and get a new bird's-eye perspective on how to set them up for success.

And don't forget the letterbox in your channel mix. For certain types of communication it outperforms email by 10 times or more.

Get the conversation started with four elements that are key to shaping your brand experience: your audience, data, content, and channels.

Get started now.

AUDIENCE

DATA

CONTENT

CHANNEL

# AUDIENCE

You want to put your customer at the centre of everything, so it's important to first consider who it is you're serving, and to whom you're speaking in your messaging. Get together with your team – or take some time to yourself – and answer the questions about your audience on the next few pages.

ALLOW 10 MINUTES FOR THIS EXERCISE.

## QUESTION 1

Who is your audience?

Who does your message reach now, and who else would you like it to reach? If you have more than one key audience to engage with, consider completing this worksheet for each audience.

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## QUESTION 2

What do your customers want from you?

Why did they seek you out initially, and what keeps them coming back?

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# AUDIENCE

(continued)

## QUESTION 3

What information are your customers missing that you want them to know about?  
Are they missing out on any great products or services?

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## NOTES

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# DATA

To measure the success of your customer experience, you need intuitive and actionable data about your customers and campaigns. Respond to the following questions regarding your organisation's data.

ALLOW 10 MINUTES FOR THIS EXERCISE.

## QUESTION 1

How many different databases does your organisation currently store customer information in?

List these databases and what they do. Are these databases integrated? Do you (or can you) have a single database of reference?


## QUESTION 2

List the customer information you currently have.

Circle the ones you use most in your communications. This could include demographics, purchase and browsing history, click-through rates, feature preferences, and more.


# DATA

(continued)

## QUESTION 3

List the customer information you would ideally like to have.

What data can you gather that will enable you to engage more deeply with your customers? Dream big: for example, what is the average amount of time it takes a customer to make a second purchase? How do subscribers enroll – through social ads, display ads, or elsewhere? The first step to getting this data is identifying the need.

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## NOTES

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# CONTENT

Great customer relationships are about more than the hard sell. Empowering your audience with helpful, informational, or fun resources can make all the difference. Spend time focusing on your content and start dreaming up new ideas on the following pages.

ALLOW 10 MINUTES FOR THIS EXERCISE.

## QUESTION 1

What kind of content helps your customers discover and understand your brand?  
Do you support and inform your customers with your content? Do they see you as a valuable resource?

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## QUESTION 2

What content do your customers want or consume most?  
What drives the most interaction with your brand? How can you expand on it?

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# CONTENT

(continued)

## CONTENT IDEA MENU

Check off the types of content listed below that you've used in the past. Circle the assets that have proven effective. Make a note of content types you'd like to use but haven't.

- |  |                                      |
|--|--------------------------------------|
| <input type="checkbox"/> BLOGS   | <input type="checkbox"/> VIDEOS      |
| <input type="checkbox"/> DATASHEETS OR REPORTS                           | <input type="checkbox"/> NEWSLETTERS |
| <input type="checkbox"/> PODCASTS  | <input type="checkbox"/> E-BOOKS     |
| <input type="checkbox"/> WEBINARS  | <input type="checkbox"/> _____       |
| <input type="checkbox"/> SOCIAL SHARING<br>(HASHTAGS, CUSTOMER MENTIONS) | <input type="checkbox"/> _____       |

## NOTES

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# CHANNEL

Your customers expect you to meet them where they are by reaching out on the platforms they use every day – whether on email, mobile, social, or the web. On your own or with your team, answer the following questions and discuss.

ALLOW 10 MINUTES FOR THIS EXERCISE.

## QUESTION 1

What channels are you using – and which perform best?

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## QUESTION 2

In which channels is engagement a challenge?

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## QUESTION 3

What channels would you like to use, but need help getting started?

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# CHANNEL

(continued)

## CREATE A JOURNEY

Meet with your team and think through your customer experience together. What are the moments that matter in your interactions? When can you make the biggest impact? For example, a welcome process, customer service follow up or annual renewal programme.

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## WRITE & SKETCH

Write or sketch out one small leg of your ideal customer journey for your brand. You can do this below or on another piece of paper if more space is needed. (Don't worry about mapping out an entire lifecycle just yet.) Consider the best channels for your content, and think of ways customer action might steer the experience.

NOTES

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SKETCH

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# NEXT STEPS

Now that you've had a chance to think over your journey strategies and assets, dive deeper to bring your ideas to life.

Connecting up with Marketing Impact will get you closer to realising your customer engagement and customer journey goals. We offer a range of customer journey processing tools including Sales Force Marketing Cloud.

If you like, we can help with you with these worksheets – or run a strategy planning session for you reviewing where you are today with customer engagement and where you want to be... identifying, prioritising then implementing projects to deliver you competitive advantage.

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