Customer Journey Mapping SOP

Intro

Hey there! This document was created by Meredith Noble and Alexandra Lustig, co-founders and besties at Learn Grant Writing. Customer journey mapping is the hill we will die on! We know integrating this process into your business will pay dividends.

If you want to connect, you can shoot us a DM on socials:

- Meredith on Instagram and LinkedIn
- Alex on Instagram and LinkedIn

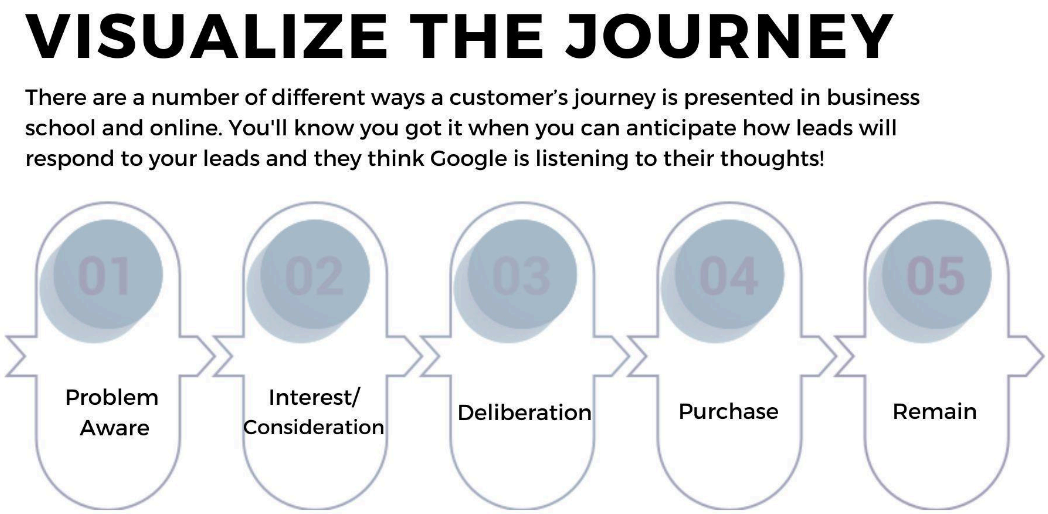
Overview

To understand our ideal customer's journey, we undertake an annual customer discovery process with current customers and prospective customers. The findings from these interviews help inform the year's marketing strategy and product development. Interviews are an all-hands-on-deck process so we are fully aligned with our customers.

The customer journey is the complete sum of experiences that customers go through when interacting with our company and brand. By understanding this journey, we increase conversion of new customers and retention of existing customers.

When communicating with customers or prospects, we are working to understand the following questions:

- What is the customer doing in each stage?
- What kind of emotions do you feel in each stage?
- What encourages (or discourages) them from moving to the next stage?
- Where do customers get hung up?
- Do they have questions and have a hard time finding answers?
- Could their uncertainties cause them to give up and find a different option?
- What are those other options?
- What limiting beliefs are holding them back?



Definition of Success

- Customer journey mapping is completed annually.
- We have a marketing plan for the coming year.
- We have a product development roadmap for the coming year.
- Our energy and enthusiasm to serve our customers has been reignited!

Note: If you want to see how we develop our marketing plan and product development roadmap, please notify Alex or Meredith so we can make note of that for a future training.

Key SOP Materials

📂 Company's customer journey map can be found here.
📂 Google Drive folder for CJM is here.

Process

Note: This SOP is written from the perspective of customer journey mapping on an annual basis. If this is your first time conducting this process, it's a very similar process. Here is some additional advice that you are welcome to then delete from your SOP!

How many interviews should I conduct? You aren't done conducting info interviews until you aren't learning anything new anymore (like you get to the point you anticipate what your interviewee will say). Expect this to be at least 20 interviews.

If you aren't having fun doing the interviews, then you have the wrong target audience! When you are interviewing the right target audience, it should give you expansive energy. It's better to figure this out now than later!

What if I haven't launched yet? First off, good! The first step before doing *absolutely anything* is customer journey mapping. The customer will unlock all the nuggets of wisdom and inspiration you need to build a world-class product/solution. They won't tell you *how* it should look - that's where your visionary kicks in, but they will give you all the clues you need to not guess.

If you haven't launched a product yet, these initial interviewees can be fabulous beta customers! People love to feel like they helped build something and that it was custom designed for them. A ton of our early customers came from those info interviews - some right way, and others years later.

Plus, there's no better way to ground truth if you have *truly* solved their pains/desires than seeing if they will spend money with you or not.

What questions should I ask? This is one of the most common questions we get! Below you will find sample questions we asked, but they will need customized for your business. Provide this book, the Mom Test, to everyone on the team conducting info interviews to make sure you aren't asking questions that will lead you astray!

Preparation

Once a year in the Fall, the team reserves a week for informational interviews focused on better understanding certain hypotheses or questions we have about the customer journey. This is typically a three week process. One week for preparation; one week for interviews, and one week for analyzing interview results.

- Define the hypotheses/questions that the marketing team wants to test.
- Define the hypotheses/questions that the customer success team wants to test.
- Prep questions for the interviews.
- Aggregate hypotheses/questions in this slide deck. (See examples inside)
- Create a 30 minute Calendly link. Each team member sends out emails requesting an informational interview.
    - Goal is minimum 20 interviews total.
    - Sample email copy is linked below.
- Create new project folder for housing interview recordings, transcripts, notes for this season's CJM.
- Prep the tasks in this SOP in Asana for project management and deadlines.

💡 **Pro tips:**

- This is an all hands on deck process - not to fall solely on the Founder's shoulders (unless you're just getting started.) Make sure everyone on the team has at least 5 interviews.
- Remember, you are trying to understand where a customer is at different moments in the journey from identifying a problem to acting on it. For example, here are four segments we focused on one year:
    - Leads who've clicked on webinar in our email sequence but who have not joined
    - Customers who signed up for a lead magnet within the last week
    - Current customers (4+ months)
    - Alumni (i.e. left as a customer)
- Do not ask "purple" customers for informational interviews. Purple customers are our biggest fans already and we won't learn as much from them.
- Before you hit $1M in annual revenue, you shouldn't need to worry too much about existing customer interviews. Focus on what you need to get new customers as one of the most common pain points is finding new, quality leads. Founders can easily fall in the trap of endless product improvement.
- If this is a new lead or not someone you have any relationship with, it can be helpful to offer a coffee card in gratitude for their time.

Email Templates

<u>New Leads:</u>
Hey there Name, Thank you for your interest in Learn Grant Writing. I'm trying to better understand the journey someone takes before they find our little corner of the internet. Would you be willing to connect for 15 minutes to share your story? Here is my calendar link to pick a time best for you: [link here] Thanks! Meredith

<u>Prospective Members:</u>
Hey there Name, Do you have time for a 1:1? We would love to chat with you about why you are intrigued by grant writing. You can find a time that works best for you here.

Thanks! Meredith

Current Members:
Hey there Name, Do you have time for a 1:1 next week? I'd love to chat with you about how it's going in the Global Grant Writers Collective for you. You can jump on my calendar here. Thanks! Alex

Alumni:
Hey there Name, Do you have time for a 1:1 next week? I'd love to chat with you about why you decided not to renew your membership to the Global Grant Writers Collective. I have a couple of questions that I'd love to ask you so that we can understand more about your experience and how we could have served you best. You can jump on my calendar here. Let me know if you have any questions and I'm looking forward to re-connecting! -Erika

The Interview

The questions we ask will vary each year depending on the segment. Prep the interview questions ahead of time and have in a Google Doc in this folder.

You do not need to take notes during the interview, as you will record it using Zoom and transcribe it. If it helps you to take notes, feel free to do so, but those are for your use.

Feel free to go off script if you feel something needs further investigated. The answer someone gives you initially is not typically their deepest desires or fears.

It can be very tempting to engage in a 50/50 conversation. Resist this! Especially resist offering advice or coaching. Keep it to a true interview where you are listening 90% of the time.

Below are sample questions we have asked different customer segments:

<u>Prospective Members:</u>

- Why are you thinking about getting into grant writing?
- What's not working about what you are currently doing?
- Paint me your vision board. What do you want your life to look like in 1 year, 5 years?
- What other career options are you considering?
- What questions have come up for you in this journey?
- What fears do you have around a career change?
- Have you found any online resources helpful in sussing out a career path that will fit?
- What attracted you to the Global Grant Writers Collective?
- What has given you pause in joining?
- What other programs are you considering?
- Did you read our book?
- Have you seen our YouTube videos?
- Does Learn Grant Writing seem trustworthy? Have you searched for reviews?
- How did we earn that trust?
- Have you taken an online course or been a part of an online community before?
- If so, what have you participated in? What did you like/dislike about them?
- What non-mainstream podcasts do you enjoy?
- What needs to be true for you to join the Collective?
- What can we make more clear in our website or elsewhere online that would have helped you decide if you want to be a part of the Collective or not?

Current Members [Recently joined]:

- Why did you decide to join the Collective?
- What gave you pause before joining?
- Paint me your vision board. What do you want your life to look like in 1 year, 5 years?
- How has your experience been so far in the Collective? Was there something clunky that was confusing?
- How many informational interviews have you conducted?
- Where are you feeling stuck?
- Have you connected with any Unicorns 1-1? [We want them to make a friend!]
- How are you taking the program? What does your typical week look like?
- What's something you weren't expecting?
- If you could wave a magic wand and have an upgrade in the Collective, what would it be?
- What other feedback do you have?

Current Members [Month 4+]:

- What has been your biggest win or feeling of accomplishment since joining? What/who helped you get there?
- What are you struggling with?
- What aspect of our program has helped you the most in reaching your goals?
- What is your next big goal? How can we help you crush it?
- What are your favorite and least favorite parts of the community group?
- Do you have an accountability buddy in the Collective? Or have you worked with other unicorns on projects?
- If there was a perspective you wish I understood, what would it be?
- Are you a part of other grant writing programs/organizations or other professional development programs? If so, what do you enjoy about them the most?
- [If they renewed]: Why did you decide to renew for year 2?

Alumni:

- Talk to me about your vision board. Are you still grant writing? Have your goals changed from when you first joined the Collective?
- Did the Collective help you to reach your goals?
    - What aspect of our program helped you the most in reaching your goals?
- What was your favorite part of the Collective? What was your least favorite part?
- How could we have served you better?
- What would you have wanted in order to continue with your membership in the Collective?
- Why did you decide not to renew?
- Do you belong to other grant writing programs/organizations? How does ours compare?
- What would have to be true for you to join the Collective again?
- What else would you want us to know?

Post Interview

- Submit audio to Temi.com and save the transcript in this folder. Or use Fathom to summarize the recording and provide the transcript.
    - Note: Hyperlink to your own folder system. You can use any transcript service.
- Highlight standout ideas or comments from the transcript. You are looking for customer pains, desires, stuck points, etc.

- Copy highlighted comments into an aggregated Google Doc available here per each customer segment being explored. This document becomes invaluable for writing ad copy, coming up with marketing content ideas, website copy, launch material, etc.
- Add a one slide summary of what you learned from each interview in this slide deck.
- Once interviews are complete, assign the Marketing Lead to review the new learnings.
- Schedule all-hands team meeting to each present what we learned, specifically identifying quick wins and longer term initiatives.