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**Customer Touchpoint Planning**

**List: Map, Review, and Improve Your Touchpoints**

1. **Identifying the different steps of the customer journey**
   1. **Before Purchase/Engaging with your services**
   2. **During Purchase/Engaging with your services**
   3. **After Purchase/Engaging with your services**
2. **Identifying the touchpoints they’re likely to encounter during each step, e.g.** 
   1. **Before**
      1. Search Engine Search
      2. Looking in the local service directory for businesses like yours
      3. Receiving a mailer advertising your product(s) and/or service(s)
   2. **During**
      1. Website (online ordering)
      2. Salesperson (in-store)
      3. Tradesperson (on-site)
   3. **After**
      1. Invoicing/Billing
      2. Follow-Up
      3. Social Media
3. **Reviewing touchpoints**   
   **Your review needs to consider general questions like:**   
   1. What is the message you give via this touchpoint?
   2. Is your message consistent with your values and brand story?
   3. Is each and every customer getting the quality of service they expect, and you are striving to provide?

**As well as touchpoint-specific questions like:**

1. **Before**   
   1. Search Engine Search (was your business easy to find?)
   2. Looking in the local service directory for businesses like yours (does your advertisement inspire potential customers to contact you?)
   3. Receiving a mailer advertising your product(s) and/or service(s) (does your mailer consider the audience receiving your mailer, e.g. age appropriate?)

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1. **During** 
   1. Website (online ordering) (is the online ordering process easy to understand and complete?)
   2. Salesperson (in-store) (were they acknowledged upon entering the store? were they served quickly, efficiently, and professionally?)
   3. Tradesperson (on-site) (was the vehicle they arrived in clean and tidy and professional, e.g., signwritten? how did the tradesperson conduct themselves on site?)
2. **After** 
   1. Invoicing/Billing (is the customer invoiced/billed promptly? is the invoice easy to understand? are all charges listed and explained?)
   2. Follow-Up (have you followed up with the customer, asking whether they have received their product and are happy with it, or if the provision of services was as expected?)
   3. Social Media (can the customer post a review on Facebook?)
3. **Identifying possible pain points, e.g.**
   1. **Before** 
      1. Search Engine Search (not showing on the first page of search results)
      2. Looking in the local service directory for businesses like yours (not advertising in the local service directory)
      3. Receiving a mailer advertising your product(s) and/or service(s) (mailer not appealing to those in an older demographic, or a low-income area)
   2. **During** 
      1. Website (online ordering) (when you click to add to cart it doesn’t ask for quantity)
      2. Salesperson (in-store) (we do not acknowledge customers on arrival, only approaching after they’ve browsed for a couple of minutes)
      3. Tradesperson (on-site) (vehicle not sign written so customer could not verify we are who we say we are; tradesperson went straight to do the job, did not knock on the door and introduce themselves)
   3. **After** 
      1. Invoicing/Billing (confusion as customer was sent a packing slip which included items and prices, and an invoice)
      2. Follow-Up (we do not routinely follow-up)
      3. Social Media (we do not allow social media reviews/we do not update our social media regularly so potential customers may not read reviews)

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1. **Improving touchpoints**

In our table we have included blank rows where you can note ideas on how you can improve the touchpoints you have identified, especially those with pain points.

You identify the touchpoints which need improving by reviewing each touchpoint and ensuring it is exceptional and useful for your customers and the stage they are at in the journey with your brand, as well as being:

Simple - Easy for the customer to understand and interact with.

Appropriate - It appeals to your customers interests and is appropriate for the context of its channel.

Relevant - It matches what your customers expect and need to find at that stage of their journey with your brand.

Meaningful - It provides significant and useful information for the customer.

Appealing - The experience appeals to what your customers want and need.

1. **Planning regular reviews of your Customer Journey Planning**   
   This is not a one-time job. You must regularly review and update your touchpoints as they will change and evolve over time with marketing channels and your operational processes growing and evolving. Regular reviewing of your touchpoints and the process ensures you are utilising all channels available to reach your customers and grow awareness of your brand, and meeting your customers wants, needs, and expectations.