Customer Journey Support Checklist

✓ **A**cquiring a new customer is anywhere from five to 25 times more expensive than retaining an existing one. This is especially true in the IoT and the subscription economy, where monthly recurring revenue (MRR) is becoming the norm.

✈ While adding fresh customers to your pipeline is crucial, retaining customers and turning them into brand ambassadors is what drives growth.

1 Map Customer Journey and Identify Touch Points

What are the important moments you need to engage with a customer? Consider every phase of the customer journey.

2 Identify plays in journey for every touch point and develop them.

- Onboarding Plays.
- Follow-up and Engagement Plays.
- Support Plays.
- Renewal Maps.

- What? When? Who?
  Do you engage in-product?
  Through email? Is this an actual phone call, or even a meeting?

3 Identify Outsourceable vs Internal Plays

After identifying plays, decide:
- What you need to keep internal.
- What you can outsource.
- What you can automate.

4 Identify Linkages Between Internal Team and Partner

Design the seamless connection and escalations between the teams, especially if you outsource onboarding, support, or any other touch point interaction to a remote team.

5 Operate and Execute Plays

Your support team needs to actually handle the calls, emails and chat sessions.

Write and schedule the emails sequences, and program the triggered events.

Visualizing the entire customer journey, and providing a consistent experience throughout, reduces churn and grows your customer base.

6 Measure Outcomes

- Track support agent performance.
- Deploy surveys to measure direct customer experience.
- Tap into product usage data to feed operations, product management and marketing.

7 Identify At-risk Customers and Selling Opportunities

Determine criteria and thresholds that will indicate whether customers are at-risk of attrition, or if there are additional upsell or cross-sell opportunities. Use data to trigger other actions.

8 Marketing and Customer Success: Implement actions

Beyond developing brand ambassadors and retaining clients, a positive customer experience also positions you to be able to upsell or cross-sell additional products or services.

Reach out to at-risk customers based on findings. Offer upgrades. Implement corrective actions.

9 Operations: Sustain or Scale

Your metrics, new product announcements and customer engagement requirements should inform whether you need to sustain what you have in terms of the operations, or scale it.

By partnering with a company that understands the customer journey and all the touchpoints involved, you can complement your own internal assets with support services and expertise that provide a consistent experience to your users.

InfoLink exp

For a complete explanation of the concepts depicted, please visit the blog post here: