



# Customer Journey

## Pre-meeting

Before a meeting with a customer it's good to send some relevant data they can review.



1

### Email "About Us"

Customers want to get to know you better, it's good to send info about your company prior to the meeting.

### Email stats & content relevant to the customer

Get in front of the deal and send the customer relevant information regarding their business.

## Webinar invite

Invite your customers to relevant meetups or webinars that they can get to know you with.

## Reminder email

Send meeting reminders to make sure that all key stakeholders will be at the meeting and reschedule if needed.

2



## First meeting

Remember this meeting is so that you can both get to know one another and make sure your plan spells success for the customer.

## Ask questions & clarify pain points

Remember ask questions that are relevant to your offering. Share relevant pain for similar company types.

## Understand needs & define budgets

Clarify the customers actual needs and budget as it relates to your offering.

2.1

## Clarify how your offering meets their needs

Ensure that you can clearly articulate your offering by illustrating outcomes.

## Follow up with meeting notes and next steps

Follow up on each meeting with clear notes and next steps.

## Findings meeting

if you have a QBR or TBR process and have an assessment this is the meeting you will want to share that info.



3



## Closing meeting

Present your contracts and pricing, schedule onboarding and implementation.

## Onboarding

Set realistic expectations on timelines for completion and ensure that everyone understands your onboarding process.



4

## Clarify objectives

Be clear on what you will be doing. Clearly articulate the products and programs you will be implementing.

## Set timelines

Define the timelines and process that will occur during the relationship and what should be expected and when.

## Educate staff

Make sure that not only the stakeholders understand your program but also the entire staff. Take time to educate them.

## Communicate plan

Communication is essential to success. Communicate often and with the right people. Make sure you have a plan for this.

5

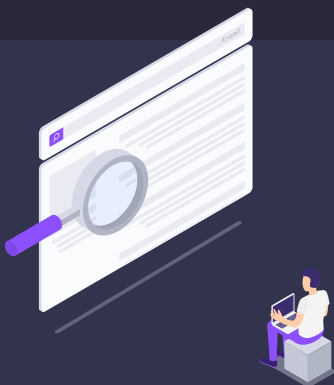


## Follow up meeting

Follow up after every major milestone in your process. Make sure your deliverables and outcomes match up with customer perception.

## Strategy call

Plan an ongoing bi-monthly strategy call. Keep momentum going along the way.



6

## Review plan

In the meeting, review the plan and it's performance. Ask questions to ensure it's meeting the customer's needs.

## Review progress

Your plan should start with some goals, based on the measurables. Make sure that the customer can also see the progress.