salesforce

Customer Journey
Worksheet Set

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

Cross-channel marketing, 1-to-1 content, and personalized 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 recognize the moments that matter most to your customer and your organization. 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.

| AUDIENCE |
| DATA |
| CONTENT |
| CHANNEL |

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

You want to put your customer at the center 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?

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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?

_____

_____

_____

_____

AUDIENCE
(continued)

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

_____

_____

_____

_____

CAMPFIRE
STORY

Nestlé
Waters®

"Our vision is to connect all the touchpoints, and move from
building databases to cultivating communities."

ANTONIO SCIUTO, EVP CMO AND EBUSINESS LEADER, NESTLÉ WATERS NORTH AMERICA

Everyone needs water. Nestlé Waters provides healthy hydration solutions to consumers around the
world – but to become customers' water brand of choice, the Nestlé team must understand and
engage its audience. That's why Nestlé's leadership uses Salesforce Marketing Cloud's Social Studio
and Advertising Studio to analyze social conversations and engage with customers on the social
media platform of their choice. From those real-time conversations, Nestlé moves consumers into
personalized, individual experiences across automated journeys, determined with predictive data
and carried out by Salesforce Journey Builder. These journeys might include direct mentions on social
media, or geofencing push notifications when the customer is near a provider of his or her favorite
Nestlé Waters product.

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 organization's data.

ALLOW 10 MINUTES FOR THIS EXERCISE.

QUESTION 1

List the customer data types you currently have. Circle the ones you use most.

This could include demographics, purchase and browsing history, click-through rates, feature preferences, and more.

_____   _____   _____

_____   _____   _____

_____   _____   _____

_____   _____   _____

QUESTION 2

List the customer data types you still need.

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.

_____   _____   _____

_____   _____   _____

_____   _____   _____

CAMPFIRE STORY

Berkshire Hathaway Travel Protection (BHTP) recruits and onboards new agents continuously, and so must stay top-of-mind with potential and existing partners. When a potential agent completes the inquiry form on BHTP's website, the company uses Journey Builder to launch an automated onboarding process based on the submitted data. If the agent does not take action at any point in the onboarding journey, BHTP taps into that data again to engage the prospect at an appropriate later date. The same applies to the issuing of product information and educational materials (sent over both email and SMS): The agent data determines what materials are sent to whom. From the agent's point of view, it's convenient, streamlined, and simple – a surefire way for Berkshire Hathaway to stay top-of-mind.

Company leadership estimates that the automated, data-driven onboarding process saves staff two to three months of work involved with expanding its pool of agents.

NOTES

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 15 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 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.

_____   BLOGS   _____   VIDEOS

_____   DATASHEETS OR REPORTS   _____   NEWSLETTERS

_____   PODCASTS   _____   E-BOOKS

_____   WEBINARS   _____   _____

_____   SOCIAL SHARING   _____   _____
           (HASHTAGS, CUSTOMER MENTIONS)

CAMPFIRE
STORY

"Prior to Salesforce, we were monitoring leads on an Excel spreadsheet. Now we're generating reports that show engagement."

JEAN WAGNER, CORPORATE RELATIONS MANAGER, **TIGE BOATS**

Tige Boats generates leads – and passes them into Salesforce Sales Cloud – using Journey Builder and Social Studio. Its strategy begins with social media, ensuring that content is localized and personalized. On warm, sunny days, social users could see a Tige ad that reads: "It's a beautiful day out. You should be on a boat!" Customers who engage with the ad and complete an inquiry form are then treated to one of 13 possible customer journeys, powered by Journey Builder. These are persona-based, leveraging content proven in the past to appeal to their specific audiences. Since implementing this strategy, Tige's leads went from an average of 15 per month to over 900.

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?

_____   _____   _____

_____   _____   _____

_____   _____   _____

QUESTION 2

In which channels is engagement a challenge?

_____   _____   _____

_____   _____   _____

_____   _____   _____

QUESTION 3

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

_____   _____   _____

_____   _____   _____

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?

_____

_____

_____

WRITE & SKETCH

Write or sketch out one small leg of your ideal customer journey for your brand. (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.

WRITE

_____

_____

_____

SKETCH

Now that you've had a chance to think over your journey strategies and assets, dive deeper to bring your ideas to life. Tune into Salesforce's customer journey webinar series for an in-depth look at planning and executing your vision. Learn ways to strengthen your journey, and discover steps to overcome the challenges and needs you've identified in your self-assessment.

View webinars at marketingcloud.com/resource-center/webinars/.

As you consider your own strategy, discover the impact of 1-to-1 experiences with your choice of sample journeys, powered by Salesforce Marketing Cloud. Select a persona and go on a journey with us over the course of seven days. You'll see emails, ads, mobile messages, recommendations, and more that a customer would see.

Start your journey at sfdc.co/anyjourney.

NOTES