

GUIDING AN END TO END CUSTOMER JOURNEY

*How to create the
perfect customer experience
every time*

WRITTEN BY: John Jantsch
Brian Solis
David Smith
Andy Catsimanes
Debra Mendes
Ann Gusiff
Kala Linck





The customer journey is what every single one of your customers and clients experiences when they interact with your business. Creating a consistent, positive experience is what sets great businesses apart. Your customers know what to expect when they keep coming back, and they know what to recommend to their friends. But too many businesses end their experience at the sale, when in reality they should be focusing on those recommendations and referrals.

You are always looking to improve how your business takes care of your customers to earn repeat business and referrals, but how do you do that? Begin by thinking about the customer journey, and try to improve every step along the way.

In this eBook you will learn:

- Why the customer journey is an important area for your business to focus and improve upon.
- How to use a tool like the Marketing Hourglass to visualize your customer journey and map out every instance your business interacts with your customers.
- How to direct your customers through the seven behaviors of the customer journey.
- Ways to integrate your brand identity into your customer journey
- How to turn your customers into lifetime repeat customers.

So use these tips and tools, your customers and your bottom line will be glad you did.

Enjoy!

How to Build Your Marketing Hourglass

By John Jantsch

Marketers have long held to the idea of the marketing and sales funnel – a notion that suggests you start with a large target group and somehow squeeze a few clients down through the small end of the funnel.

For years now I've been promoting something I call The Marketing Hourglass™, a much more holistic and increasingly effective approach in the “era of the customer” we live in today.

The marketing funnel suggests that the buyer's journey is a straight one and the we as marketers are in charge of how they tread the path when in fact so much of the buyer's journey today happens without our knowledge and participation.

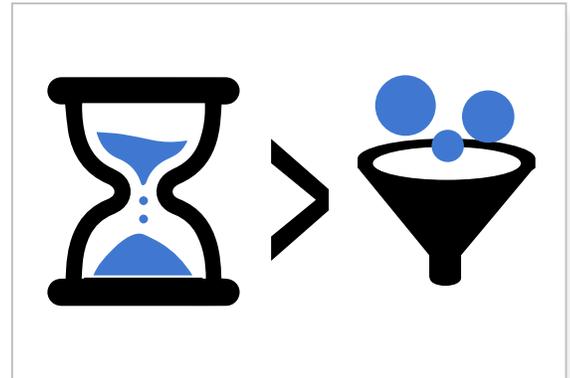
Today we have to understand how the buyer wants to buy and put our businesses along that path – long before a prospect even knows they are looking for what we sell and long after we've transacted that sale.

A traditional marketing funnel might have stages such as Awareness, Consideration and Purchase, while our Marketing Hourglass consists of seven connected stages – Know, Like, Trust, Try, Buy, Repeat and Refer.

Here's the thing that the marketing funnel neglects to address – when it comes to lead and referral generation a happy customer is your best tool.

By taking the marketing hourglass approach and giving equal attention to building trust and delivering a remarkable experience, you set your business up to create the kind of momentum that comes from an end to end customer journey.

In order to apply this framework to your business your must get a baseline on how your business interacts with prospects and clients currently, understand how your prospective customers make a buying decision and construct an hourglass journey that guides prospects through the logical stages of your marketing hourglass.



Audit Your Touchpoints

The first step is to take stock in the ways that your business comes into contact with customers and prospects.

Experience tells me that some of these ways are planned and scripted, while some are not. Some happen by accident, while some simply don't happen at all.

For example, a very common gap in the businesses we work with exists in the transition from transaction to implementation. Marketing and sales got the order, but what happens next?

Another very common mistake is to believe that all you have to do is run ads and respond to requests when, in fact, many potential buyers want hand holding and nurturing and follow-up in order to know you'll deliver on your promises.

Map The Customer Journey

One of the hardest things for many business owners to do is to put themselves in the shoes of prospective clients long before that client knows that you have the answer.

We often want to convince people we can solve problems they don't even know they have.

In order to effectively build your Marketing Hourglass you must fully understand the questions your prospects are asking themselves before they are aware that you or your solutions exist.

For example, if you sell signage, you must start to build awareness through your marketing to prospects, not by explaining how great your signs are, but by addressing ways that businesses can build a stronger culture, attract more clients and make it easier for customers to find what they need – all great uses of signs by the way.

Construct your Marketing Hourglass

Now that you're thinking touchpoints and journeys you can start to fill in the logical stages of your hourglass with the campaigns, process and touchpoints that will lead to a great experience.



- 1) **Know** – This is the awareness phase so articles that do well in search, advertising and even referrals need to start here.
- 2) **Like** – This is the stage where once you attracted them to your site you have give them reasons to come back, reasons to relate and even reasons to like your team.
- 3) **Trust** – In this stage, reviews, success stories and client testimonials are your currency.
- 4) **Try** – Now that they are wondering how your solution might work for them it's time to shower them with eBooks, Webinars and very detailed how to information. You might also have an evaluation, trial version or low cost option to offer here.
- 5) **Buy** – For this stage the focus is on keeping the experience high. Think about how you orient a new customers, exceed their expectation and even surprise them.
- 6) **Repeat** – Perhaps the best way to get repeat business is to make sure your clients receive and understand the value of doing business with you. Here's where you need to consider adding a results review process as well as additional upsell and cross sell touchpoints.
- 7) **Refer** – The Marketing Hourglass journey is ultimately about turning happy clients into referral clients. You do this first and foremost by creating a great experience, by being referral worthy, but you also have to build processes and campaigns that make it easy for your champion clients to introduce and refer your business.



Digital Transformation Starts with Reimagining the Customer Experience

By Brian Solis

All customers are not created equal. This is also true for relationships. No business has the same relationship with their customers as you intend to have with yours. The thing is though, you must first define what a relationship with your customer looks and feels like and in turn, how they would describe it to their friends and colleagues. This is where the future of customer experience begins.

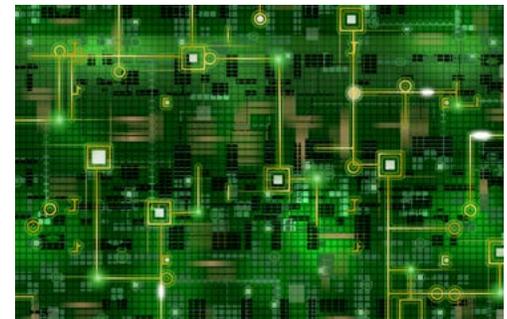
At a time when technology is affecting how people go through life, one thing is becoming clear, everything is changing and that also affects the business of business. At the same time, technology is introducing new opportunities to improve customer relationships and ultimately the experiences we want them to have and share. In fact, I'd say that as crazy as all this new stuff is (social media, mobile apps, smart watches, smart phones, smart cars, smart appliances, wearable computers, virtual reality, etc.), companies now have the opportunity to become more human and more relevant than ever before.

Every one of these new technologies provides us with greater insights into customer behaviors and aspirations. We can better know our customers, appreciate their expectations and in turn, deliver more personal and valuable customer experiences. The challenge is that we have to want to and we need to do things differently in order to do so.

The good news is that consumer technology isn't the only sector undergoing great innovation and disruption. Innovation is also underway in the world of enterprise software. Now well-intended businesses have the technology that facilitates improved customer relationships and experiences. Again, businesses will have want to make investments in innovation to do so.



Now that you have a well-defined marketing hourglass with your customer journey well-mapped, it is time to begin to improve it. Renowned digital analyst and anthropologist and best-selling author Brian Solis will explain where to begin with today's technology in mind.



Transform Digital Customer Experience for the Connected Customer

I recently partnered with Genesys to explore the state and future of customer experience (CX). Through research, we aligned evolving customer expectations with the best practices of those companies that get it.

How you invest in your CX is the difference between a compelling competitive advantage and mediocrity and irrelevance.

It's a bold leap forward to trust something as fickle as a customer relationship. But what if it wasn't so fickle? What if the customer relationship were inherently trustworthy because of the effort you invested in its promise?

That's the importance of CX. Customer relationships are a byproduct of the experience you design, support and reinforce.

Everything starts with a vision for what the [customer experience](#) could be compared to what it is today. Naturally, you'll find a gap. Closing this gap immediately is your CX imperative. Investing in the CX to bring your vision to life is your competitive advantage.

CX matters.

Every touch matters.

It just takes a common vision to take everything to an entirely different level.



60 Ways to Screw Up the Customer Experience

By John Jantsch

I rarely lead with the negative, but sometimes it's the best way to get someone's attention.

When I present marketing strategy to groups I'll often ask them to identify the characteristics of their ideal customers, and they can't seem to narrow their thinking beyond people with money. But when I ask them to tell me who they "don't" want to work with, many characteristics leap to mind.

Here's the deal – every way, shape and form that your business comes into contact with prospects, customers and friends of friends of both, you are performing a marketing function. So let me ask you this – have you considered the impact or lack of impact of every touch point in your customer's journey?

In order to expand your thinking on this point, let's audit the real and potential touch points that impact the customer experience and ultimately your brand, in general. (The main thing we are looking for is an appealing, positive, consistent message across these touch points and a call to action that makes someone want to go on a continuing journey with you.)

Some of you might recognize the categories of know, like, trust, try, buy, repeat and refer as stages in something I've been calling the Marketing Hourglass, that point to the logical way to think about a perfect end-to-end customer experience.

Know – This is how people become aware of your business and brand.

- **Website** – Many times a prospect visits your website first to learn what you have to offer – what message does this touch point send? (add this question to every point below because that's what I want you to consider.)



Be sure to avoid these 60 pitfalls that too many businesses stumble upon in their customer journeys.

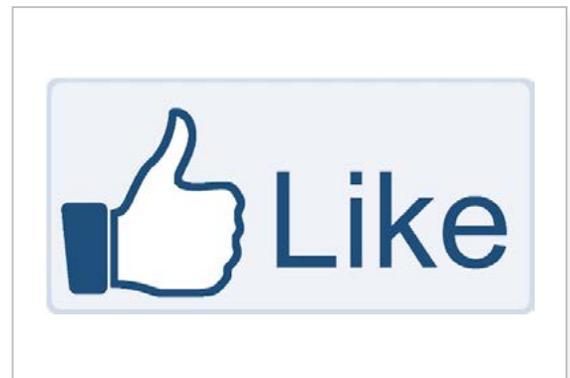


FAIL

- Advertising – Your ads may be the first way someone is introduced to your business.
- Marketing materials – Don't forget offline materials that help tell your story in more tactile ways.
- Networking – How you network, where you network and who you are in conversations with, are all part of your brand
- Networks – What social network you choose to engage in, and how deeply you choose to participate matters.
- Referrals – When a raving fan refers someone to your business, how are they greeted? Are they treated special?
- Content – How are you using content to both create awareness and act as a home to send those who encounter your ads?

Like – This is the stage in which people are starting to notice your brand and decide if they want to know more.

- Community involvement – Encountering your brand through other communities and community involvement can send a strong signal about what you're passionate about.
- Events – Demonstrating your expertise and giving advice before you ever start to promote is one way to gain respect and authority.
- Physical presence – What does your office, your store, your dress say about your brand? I'm not suggesting what it should say, simply that it does speak something.
- Value proposition – Do people automatically understand that you do something very, very well that matters to them?
- Social engagement – How you engage on Twitter, Facebook and LinkedIn is observable – have you considered the impact of this on your brand?
- Graphic design – Many companies have won with a focus on design. Many more don't give it a second thought. What does the design of your product, service, website, communication, email signature say or not say?
- Content – Again with content – it has an intentional use at just about every stage, but you must understand each use – for like, content might just be mostly about telling your story.



- Your people – Culture is marketing and for the most part people experience culture through people. Do your people understand your brand and have they been recruited because your story resonates?

Trust – No one buys from companies they do not trust and it's never been easier to learn who is trustworthy, and who is not.

- SEO – I like to put search at the top of the trust list because today if you're not showing up in a variety of online fronts, you're throwing off a huge trust downgrade. If you don't dominate the entire page one for a search on your company name, you've got an issue.
- Reputation – We won't do business with companies that even total strangers have told us don't keep their word. Proactively managing your reputation online and off has to be part of the marketing puzzle.
- Referrals – Referrals, like other elements, show up in different stages because we are no longer really in charge of how people go on a journey. A referral can be the ultimate trust signal if you treat it that way.
- Demonstrations – People often misinterpret a demo as a way to show what a product or service does – it's not, it must first be a way to show why what it does is so awesome for me. Fix this part!
- Influence – Like it not, the last time I checked my Klout score (okay it was today) is was considered pretty good. Yes, people obsess over social proof and that's what makes it matter as a factor. Work on building your influence by helping others build theirs – more on that.
- Success stories – Show me proof that other people just like me actually achieved what I want to achieve by working with you.
- Public relations – I believe someone else who says you are super talented more than I believe you telling me that. Seeing your name penned by others or reading a piece you contributed to a publication I respect send huge trust signals.
- Consistency – This is a tough one. I guess this is actually a rallying cry for process documentation, but know that one of the greatest eroders of trust is an inconsistent experience. How do you make sure I get the same experience every time and every place?
- More events – Getting to experience your knowledge and slightly sarcastic sense of humor by way of a webinar or presentation at the lunch network I belong to is one powerful way of building trust.



- **Connecting** – Who you are connected to, who you have as a guest on your podcast, and who you reach out and connect me to suggests you are someone to trust.
- **Content** – Oh no here it is again – what content are you offering freely that takes our relationship to entirely new level now that I'm really paying attention?
- **Sales process** – This might be another call for consistency, but simply having a process for when someone completes an online form or requests a demo is a start. Even better, what could you do that would blow me away in response to my hinting I might need what you offer?

Try – This is a stage that many neglect, but now that I think you have the answer, can you prove it?

- **Demonstrations** – The demo shows up here again because now I just might want to know how the thing is going to work for me and my team – this is a different kind of demo, but it still needs to be about me and my team.
- **Freemium offer** – Is there a way to let me try it for 30 days first?
- **Starter offer** – Is there a smaller version that would give me a greater sense of why I can't live without you and your solutions?
- **Switch offer** – It's painful to switch – what could you do to make it fun and risk free?
- **Proof of concept** – Personalize something just for me so I could see just how great life will be when you're my partner.
- **Events** – Events are also a pretty good way to let someone see what it might be like to work with you – an event can be a meeting with the executive team of a prospect where you facilitate a discussion and help the team align on priorities.
- **Conversion materials** – Blog posts and ebooks are great in the start, but now you have to personalize and demonstrate or calculate the return on investment for me.
- **Upsell process** – Okay I've tried it out and I love it, but now you want me to pay? What have you done to hammer home the value and let me see that I would be a fool to not jump in full time now?

A blue button with white text that says "TRY IT NOW!". The button has a slight gradient and a shadow effect.



- Incentive program – Sometimes you’ve got to have a plan to sweeten the deal to get me act today – let me bring a friend, give me annual pricing or surprise with me something more than I was expecting.

Buy – The buying experience itself is an often overlooked touch point in the marketing process, but it must be as intentional as everything that led to this point.

- Sales process – What do you do when the phone rings? Remember if this has been done right, I already know, like and trust you – what do you do in the sales process that keeps the experience useful?
- Nurturing process – I can’t make a decision right now or at least I don’t know how to – what do you do to continue to show value – what materials, training, education can you shower me with?
- Orientation process – I’ve said yes, now what? Do you have a process that makes certain I know what’s going on at all times, I know who to call, what to send, how to get in touch?
- Training materials – Yes I know you explained how to use your gizmo, but that was a while ago – where can go to learn how again, where can I send my people, how do I become a ninja user?
- Cross sell process – Worst phrase a business can hear – Oh wait, I didn’t know you also did that, I bought from XYZ company. How will you let me know what else I might need in a way that a friend might tell a friend about something cool?
- Contract process – Wait, you mean legal is part of the marketing team? Oh yes, and how many sales have been killed by this branch of the marketing team? The contract process is what it is, but does it have to be so painful? Why not make it one of the most playful parts of your brand?
- Financial engagement – You expect me to pay, I know that, but did you know your billing, shopping cart and even how you communicate about being paid are also marketing functions? Consider this touch point as part of the buying journey.
- Project management – Depending upon what you do, how you manage the work, communicate progress, add and assign tasks weighs heavily on how smoothly a project goes and whether there will be another.



- **Delivery** – This can be the delivery of information or of a physical product in a box, but it's a marketing touch point. Think about the coolest present and wrapping you ever received, and work from there.
- **Communication** – As you work with clients you have to adjust to how they want to communicate. Sometimes that means you have to offer options, show them how to unify communications and teach them some new ways to communicate that will benefit their productivity and amplify your results.

Repeat – One of the best ways to grow a business is to do more with existing clients while you add new.

- **Results review** – Now that you think I'm happy what are you going to do to make certain? Do you actually know the value of what you've delivered?
- **Events** – Events and content are staples in every stage but now that I'm a customer I want to know that you consider me a part of your community.
- **Testimonials** – Part of the process of finding out how much value you've delivered is to use it as a way to consistently collect rave reviews.
- **Case study** – Do you have a process to document what a great result I got?
- **Cross sell** – Do you have a process to make sure I know what else you can do for me?
- **On going training** – Keep teaching me more about how to do things I want to do, and I'll keep buying more of those things from you that allow me to do that.

Refer – Every business loves referrals – most get referrals for good work done, but few intentionally generate referrals.

- **Referral education** – Do you have a process to teach your referral champions the best way to spot and refer a prospect?
- **Events** – Bring your champions together and make them a network – empower them with extra attention
- **Referral offers** – Make a game out of referring your business, and keep your offers (rarely financial) top of mind by reminding me quarterly how to play the game.
- **Referral materials** – Do you make it easy for your referral champions to put something tangible in the hands of their friends, neighbors, and colleagues?



- Partner outreach – Don't forget about the power of building a team of best of class providers for almost everything your clients might need. This team could be the greatest source of new business for you.
- Co-marketing – Have you identified 4-5 other businesses that target your same ideal customer? How could you multiply the number of people that come into contact with your brand through this group?
- Referral content – Yes, I'm going to end on content. What eBook, webinar or presentation could you take to your partners with the idea that they could use this content to shower value on their network while also subtly referring you?

As I read back through this long and winding post it dawned on me that you could view this as a way to guide the customer experience or you could simply employ this as your entire marketing plan – either way, you win.



A Simple Approach to the Customer Journey

By David Smith

If you are a small business owner, you instinctively know it's a wonderful thing when a customer receives value AND has a very positive experience when they deal with your business.

If the journey is hard and the experience is on par with your peers, or worse, unpleasant, you'll have no chance of building a lasting relationship (loyalty) with the customer. You'll miss out on the repeat business and referrals that delighted customers bring.

Plainly speaking: The better the experience with your business, the more opportunity you will have with the customer.

That is why Customer Experience (CX) has become a much talked about element for building a successful business.

The major consultancies (Gartner, Forrester, etc.) define Customer Experience in a common way: customer feelings and perceptions caused by interactions with your business. Large companies are advised to have coordinated and consistent experiences across their multiple channels and business units. Many large organizations have an entire department focused on nothing but Customer Experience.

If you are a small business, the complexities of multiple business units may not exist. Your sales transaction, support, service, training, and other opportunities to craft customer experiences go through a small set of people and systems within your business. With limited resources, effectively designing and managing the Customer Experience can become overwhelming to a small business.

By taking a simple approach, a small business can achieve the same results as a large organization that has a Customer Experience Officer or Department. Using a small business perspective may be the best way for you to think, plan, and implement interactions that achieve positive feelings about your business.



The customer is a difficult thing for some business owners to grasp. Duct Tape Marketing Certified Consultant David Smith explains how to think about it in a different way.



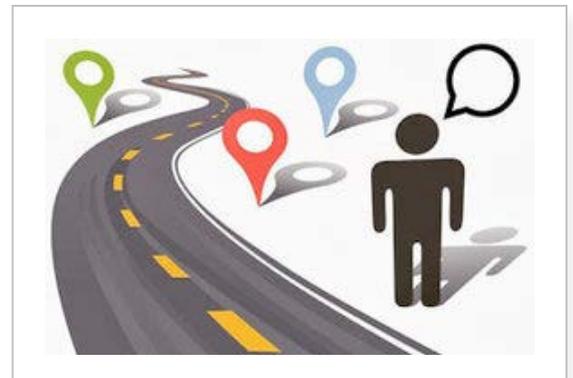
Instead of thinking Customer Experience (macro) think Customer Journey (micro).

Simply put – break it down.

Practically speaking, the Customer Experience is made up of many Customer Journeys. The Customer Journey is the path customers take to solve a particular problem or need. In some cases, the journey results in a transaction for a good or service, which is why the Customer Journey is sometimes also called the Buyer's Journey.

Customer Journeys are repeated for every instance where the consumer is purposely engaged and looking to achieve a value outcome. The cumulative effect of these interactions creates the Customer Experience.

By breaking it down, moving from the macro view of Experience to the micro view of Journeys, you can begin to simplify and design the interactions of your customers one at a time. The Journeys are simply the interactions and opportunities you have to deliver value and build positive feelings in your customer.



There are potentially dozens of major points of interaction within a small business.

Examples include interactions from:

- the initial purchase
- returning customers
- support or service
- training or instruction
- billing or administration

If you use a consistent framework, such as the [Duct Tape Marketing Hourglass™](#), you can define the customer progression toward value and positive feelings. The Hourglass will allow you to map the progress the customer takes from discovering they Know, Like, and Trust your business, into the conversion phase of the Hourglass, Try and Buy.

The Customer Journey doesn't have to be complicated. Breaking it down into small parts allows you to successfully build systems that deliver value and create positive interaction.



Integrating Brand Story and Customer Journey

By *Andy Catsimanes*

Every workday I sit down with my business partner – who also happens to be my amazing wife, Shawn – for our mid-morning breakfast break.

We have a set routine, including our menu, which consists of steel-cut oats mixed with peanut butter, yogurt, berries, ground flax seeds, chia seeds, cinnamon and homemade granola (or “crunchies”).

About 35 minutes after the hour, as we sit down to the table, one of us will turn on the television and say, “What’s Rachael cooking today?”

And then we eat our breakfast as Rachael Ray demonstrates her latest shortcut to culinary good times.

The Takeaway for your business?

Rachael has made her brand story part of her viewer’s life story and parlayed that relationship into a small empire to the benefit of both her and her viewer.

How Do You Integrate Your Brand Story Into Your Customer Journey?

The first step is the most obvious. It’s also where many businesses stumble:

Have a story to tell and a point of view from which to tell it.

Of course, “point of view” refers to much more than your take on things; that’s just an opinion.

Your point of view should encapsulate the total value you bring to your ideal customer, otherwise known as your brand hero.

What is it about your own business’ journey that your brand hero finds compelling?



Your customer experience is part of your brand; it is a major part of what your customers and potential customers think about your company. If you think about how you can integrate your intentional brand identity into that journey, you can create something special. Duct Tape Marketing Certified Consultant Andy Catsimanes explains how.



If you aren't sure, ask! Or better yet, have a skilled interviewer ask for you. Jonah Sachs, author of [Winning the Story Wars](#), describes this process as “finding the moral of your story.”

Your moral, writes Sachs, is a truth about how the world works. Rachael Ray's moral could be stated as “Cooking is more than nutrition. Cooking feeds the body and soul and brings us all closer together.”

And Rachael promises to show us how to make that work, even with the most time-starved of schedules.

Once you have the moral of your story, weave it into your content at every opportunity.

Equally as important, you must also understand your buyer's story

(Notice throughout this article, I refer to your “buyer” or customer in the singular case. That's a habit I learned as a direct response copywriter, and one that the Duct Tape Marketing System places great emphasis on.)

As marketers, we have access to mountains of data. And the most effective way to organize that data is to personify it.



As [Brené Brown](#) likes to remind us, “Stories are just data with a soul.” That's why a buyer persona needs to be more than just a profile. It's your window into the soul of your customer.

How to breathe life into your buyer persona:

In [Duct Tape Marketing](#), John Jantsch recommends that you not only name your buyer, he suggests you might want to make a “Fathead” style cutout and seat it at the conference table during your next marketing meeting.

Ask your persona questions. Enter into the conversation going on in your customer's head.



Rachael Ray's marketing team can track how many hits a particular recipe gets online after it has aired on her show.

And like the smart marketers I'm sure they are, they'll take that information and all the other data they have to not only enter the conversation in their customers head — they'll use it to enter the story going on in their customer's life.



Want Life-Long Customers? Design the Customer Experience Through Their Eyes

By Debra Mendes

The relationship you create and develop with your customer is key to developing a successful business. The experience the customer has with your business is a driving factor in developing this relationship. The experience or relationship is not just about how they feel about your product or service; it is the entire journey beginning from the first moment they meet or discover you.

To build a long lasting relationship with your customer, begin with a comprehensive and consistent framework. [The Duct Tape Marketing Hourglass™](#) allows you to design the customer experience by identifying and understanding each interaction with the customer and progression in the relationship with you. The Hourglass will allow you to map the journey the customer takes as they get to Know, Like, and Trust your business, into the conversion phase of the Hourglass as they Try and Buy your product or service, and ongoing as a life-long customer who Repeats and Refers.

Defining your customer interactions may seem like a lot of work. It is. But it's valuable. Customer loyalty and referrals deliver financial dividends and are the result of a positive customer experience – one that is worth sharing with others.

The key to building successful interactions is to predict your customers' needs and proactively resolve them. Often what we do is think from our point of view of how do we connect, what do we give them. Instead consider questions from their point of view such as:

- What information do they need?
- When do they need it?
- How do they want consume it?
- What will they want to do next?



The best way to improve your customer experience is to think about what they want as they interact with you. Duct Tape Marketing Certified Consultant Debra Mendes explains why putting yourself in their shoes can be so valuable.



Questions to understand what your customer needs and wants will help you create and reinvent a positive experience. Taking the approach from the customer perspective first instead of mapping out the points of contact and how you want to interact with them will give you the fresh look at what it is the customer expects.

Step 1 – Getting Started

In order to design and deliver these customer interactions, you first need to have developed your marketing strategy. Understanding your purpose, difference, core message, and ideal customer makes defining your customer interactions easier for you and more valuable for your customers. Each of your interactions should be designed from the perspective of an individual customer persona.

Step 2 – Understand the Customer Perspective

Begin by creating a customer experience map. In the first column list the following five (5) questions. (Note: you can do this on a piece of paper, a spreadsheet, or a white board.)

1. What is the customer goal(s)?
2. What questions does the customer have?
3. What is the customer expectation? (What expectations to they have in perspective of answering their questions?)
4. What is the customer feeling?
5. What action/outcome do we think best helps customer? (What action do we want them to take?)
6. How can we create the journey to achieve customer goal?

	Know	Like	Trust	Try	Buy	Repeat	Refer
Goals							
Questions							
Expectations							
Feelings							
Outcome							
Experience							



Notice we did not start with points of contact, the idea is to know why they would connect, and then design how to connect with a purpose.

Step 3 – Map the Customer Journey

Create a row above for each stage of the Duct Tape Marketing Hourglass™ begin with Know, Like, and Trust then continuing into Try and Buy and ending with Repeat and Refer. This framework will allow you to answer the questions about the customer experience and envision how they will progress from one step of the Marketing Hourglass to the next. Repeat the process for each of your interactions.

Step 4 – Prioritize and Implement

With your new experience map in hand, you can now prioritize and begin to develop or improve the systems that will provide the most value to you and your customer.

Designing the customer experience with a view to creating life-long customers doesn't have to be complicated. Using the Marketing Hourglass as the framework and putting yourself in the mindset of your customer will allow you develop customer relationships that have lifelong benefit for you and your customer.



How One Client Used a Drought to Create a Better Customer Journey and Working Relationships

By Ann Gusiff

One of my clients is in the landscape maintenance business. A large portion of their accounts is Home Owners Associations (HOAs) that use a property management firm to oversee the property. In working with my client on their marketing strategy, we discovered that the job of a property manager is not easy. In fact, there are so many people to please, costs to control and issues to keep at bay that part of our positioning has been to make their lives easier. Our goal has been to nurture the relationships with property managers, HOA board members and the folks on the landscape committees so that we can do a solid job on the ground with crews maintaining the landscaping and be considered favorably when the contracts come up for renewal (typically every few years).

Here are some ways we are using the Duct Tape Marketing Hourglass to create a customer journey that is smooth.

Putting Ourselves In Their Shoes – It wasn't until we talked to the property managers during the strategy portion of the engagement that we learned how tough their job can be. By putting yourself in someone else's position and thinking about their needs, wants and challenges you're able to see things from their perspective and act accordingly.

Identifying Pain Points – For this example, HOA property managers have several:

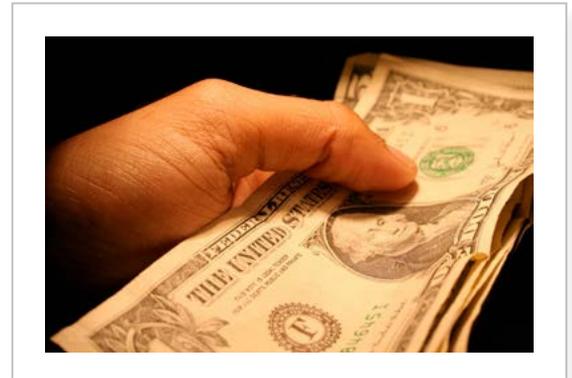
- They answer to and interact with a group of stakeholders – board members, landscape committee members, homeowners and contractors doing work for the HOA, such as my client the landscape maintenance firm. Each of these roles comes with its own needs and concerns, and the property manager has to deal with resolving conflicting needs.



Business owners should always be looking to improve their customer journey, but sometimes it takes a crisis to cause a business to do so. Duct Tape Marketing Certified Consultant Ann Gusiff recalls an instance in which one of her clients was forced to do so because of a drought.



- Budget is a key concern – There’s never enough money to keep everyone happy, and there are many ways to spend the limited funds to try to get the results needed. It’s the property manager’s job to act in the best interest of the HOA and stick to the budget.
- Drought here in California is at the top of everyone’s mind. When I was initially working with this client in 2012, and they would bring up irrigation as a topic with accounts, it was perceived as “doom and gloom,” but in the past two and a half years the climate has changed. With the continuing drought, daily press on the topic and the restrictive measures that are being put into place, they have an opportunity to provide solutions and education. People are more open to taking action.



Lawn conversions (most typically exchanging lawns with native plants), irrigation upgrades and fixing leaky pipes are just some of the ways that an HOA can control their water usage. The lawn conversions and irrigation upgrades can be costly enhancements that won’t provide payback for years, but they’re necessary to consider now that the lawns are already brown even before additional impending water cutbacks.

Solutions Thinking – In talking to several property managers during the strategy phase of our engagement, I found that managing relationships and expectations can be incredibly stressful and difficult. She has to solve problems, deal with emergencies and one of her least favorite, respond to the small group of nitpickers (those homeowners who look for problems and make the property manager’s job even more difficult). It’s just this situation that occurred recently when a frustrated property manager gave out the landscape maintenance foreman’s number to homeowners complaining about irrigation issues. Responding to these “emergency” after-hours calls resulted in significant extra costs to the HOA since many turned out to not be emergencies. To help the property manager, my client created a script for her and those in her office fielding phone calls about leaky irrigation. Following the script and asking questions of the caller about what they observed about the leak helps to determine if the leak is serious enough to call in the landscape maintenance company on an after-hours call.

The benefits of implementing this script were several, we 1) made it the property manager’s life easier to manage those calls, 2) provided a tool to educate and



manage expectations of homeowners, 3) reduced “emergency” calls and the costs charged to the HOA and 4) have improved relationships for all involved.

Next Steps - We are taking this concept a step further. That script is valuable content, which can be leveraged with other clients too. We are sharing this content with other property managers to use (in fact, my client is presenting on this very case topic at an upcoming conference on water management). We are developing additional content that will educate homeowners, board members and landscape committees about key grounds issues that their HOA may encounter. Not only will this help the HOA, but it will also raise awareness of my client’s residential tree trimming division. Our goal is to ensure that my client is considered for all contracts that come up for renewal, an indicator that is easy to track. Strong working relationships with property managers and HOA board members along with top quality work that is within budget will be the drivers.



6 Ways to Develop Repeat Customers

By Kala Linck

You may have heard us talk about the Marketing Hourglass. The Marketing Hourglass refers to the entire customer journey, from when they first hear about your brand, to when they decide to purchase from your brand, to when they become a loyal customer and refer your brand to other potential customers. This technique, we've found, is the best way to find and secure business.

The bottom of the hourglass ("Repeat" and "Refer") can be neglected when so much energy is going into finding and converting new clients and customers. Now that you've secured the business or converted the lead, you're celebrating! Plus, you're exhausted from all of the work it takes to make a sale or gain a customer. Today, I'm going to help you make sure that your clients are repeating. It's vital that your customers return to your business a second and third time. When they become repeat customers, you rely less on the energy for new customers because

- a) you've got customers coming back, and
- b) those customers can refer you to new customers.

Products and services are different, which is why I put together three tips for each on things you can do to ensure you keep those customers coming back for more.

Services

Let's start with services. There is a lot of pressure on the service industry to provide continuous support. Just one bad experience can turn a customer against you, and these things can help prevent that from happening and keep them coming back for more. The key is to be the most convenient offering of your particular service. You can do this by:



Some of your most valuable customers are the ones that return to your business. Earning those customers is all about the customer journey, and creating something that they want to return to. Here are 6 ways to earn their trust and repeat business.



- **Offer packages.** If you offer packages, you'll provide an immediate reason for a customer to keep coming back to you – at least until their package is over – giving you plenty of time to provide great customer service. By the end of their package, they won't want to go anywhere else! A great example of this is something I recently experienced when I needed an eye exam. It's necessary that each time I go in for an exam, I purchase contacts. So, by purchasing one eye exam and getting the next two free, my eye doctor is guaranteeing that I will make my next two contact purchases from them.
- **Send reminders.** One reason that I keep going back to my dentist is because every six months, they call to remind me that it's time for a regular cleaning. When they call me, we schedule my appointment. Now, remembering to go to the dentist is one less thing that I need to do, and it's that convenience that makes me a repeat customer.
- **Offer an unexpected bonus.** Many times, what we pay for is what we get. We can pay to get our yard mowed from seven different lawn companies, and when we get home we see that our lawn has, indeed, been mowed. Stand out from the other lawn companies by spending an additional half hour edging the sidewalk for a client. They will see the difference, and it will help them to remember to call you when they need lawn care again.



Photo via PhotoPin

Products

What about products? All products, but especially if you've got a lot of competitors, need to ensure customers get value out of your product so that they will continue to make purchases. With products, you've got a margin to contend to. What are some subtle differences that you can offer without diminishing that margin? Here are three ideas that can help you maintain your customer base:

- **Provide fast shipping.** I don't think I'm the only one that gets thrilled when something I ordered gets to me at the low end of the projected shipping timeline. Three days is certainly better than five! There is minimal that you can do when the package leaves your warehouse to head to your customer, but what can you do on the front end to speed up your process? Knowing how

long packages take to get to your customers is the first step. Make sure your projections are accurate, under promise and over deliver, and if necessary, make some changes in your process to get your customers what they purchased faster.

- **Offer points.** Credit card companies have been doing this for years, but now products are starting to see the benefits of offering a points system. Much like the rewards program at your favorite lunch spot that you keep going back to because you're SO close to that free lunch, rewards programs are a great way to stay in touch with customers and build loyal fans.
- **Use special packaging.** When packaging is personal or nicer than your average crushed box, customers are more likely to buy again. Most everyone wants to feel special. Whether it's putting your product in a decorative paper bag with crepe paper before they walk out the door or adding a special customer note in their package when you ship it, that little touch of something extra will help your customer remember you for their next purchase.

There are many ways that you can make your customers feel like they are spending their money in the right place, and these are just a few that I have found to keep me coming back for more. You've probably been thinking about your product or service throughout this post. Have you come up with any ideas to implement into your customer journey? Or is there something that you already do that is effective?



Photo via PhotoPin





Monthly Favs

Every month I like to collect some of my favorite links and tools to help take your marketing efforts to the next level. Here are my monthly favs.

Autopilot - software designed to help you create a more personalized customer journey.

DashThis - beautiful looking dashboards that you create based on the data sources you choose.

Zeef - Content creation tool - here's a list of lists for marketing tools

My Creative Shop - Online brochure and flyer maker

CastScoop - Free guide to startup podcasts

VideoScribe - easily make your own whiteboard videos

Zoho Live Chat - Nice little live chat and visitor tracking add-on from Zoho

pr.co - All in one Public Relations tool that makes creating a press room easy

Place-it - tool that makes it easy to create screenshot demo videos and mockups (Like the image in this post)

Bundle Post - tool that makes it easy to aggregate, curate and bulk schedule social media shares

Focus@will - Music optimized to boost your concentration and focus

Squall - Interesting tool that allows you to place longer form content in Twitter via image



The Duct Tape Marketing System

Thank you for your interest in the Duct Tape Marketing System and this lesson topic, Brand and Identity. If this content interested you, I urge you to join our exciting new online program and community, [The Duct Tape Marketing System](#). There you can find even more content on this subject as well as the other aspects of the Duct Tape Marketing System.

When I created the Duct Tape Marketing System, I sought out to impact as many businesses as possible by installing a practical and effective marketing system that ensures ongoing marketing success and growth. This new program includes the many lessons and modules of the Duct Tape Marketing System so you can install it in your business. In addition, you will have access to:

- Exclusive live webinars
- Monthly Q&A sessions with John Jantsch
- The accountability of a vast network of marketing consultants and business owners to help you meet and exceed your marketing goals

If taking control of your marketing efforts interests you, I urge you to take advantage of this opportunity. For more information, visit www.ducttapemarketingsystem.com.

Marketing Hourglass Worksheet

We have referenced a powerful tool called the Marketing Hourglass numerous times over the course of this eBook. Completing your own Marketing Hourglass is a great way to begin thinking about your customer journey and all of the behaviors your customers exhibit over the course of their interaction with your business. We created this worksheet to help you complete your very own Marketing Hourglass, and it is included here.

This is just one of the many assets available to you as part of the Duct Tape Marketing System Program and Community. To find out more about the program and how it can help you not only improve your marketing efforts but also set your business up for ongoing growth, [click here](#)









Hourglass Framework Worksheet



Use this worksheet to create initial strategic framework and language.

Company Name

Date

The Marketing Hourglass®

Know

Like

Trust

Try

Buy

Repeat

Refer

1. Know – Your ads, article, and referred leads

2. Like – Your web site, reception, and email newsletter

3. Trust – Your marketing kit, eBooks, and sales presentations

4. Try – Webinars, evaluations, and nurturing activities

5. Buy – Fulfillment, new customer kit, delivery, and financial arrangements

6. Repeat – Post customer survey, cross sell presentations, and quarterly events

7. Refer – Results reviews, partner introductions, and community building