

Hi!

You're on your way to optimizing your
Customer Journey for success!

Make these templates your own:

- 1. Go to File > Make a Copy to make a copy to your Google Drive**
- 2. Go to File > Download As > Microsoft PPT**

CUSTOMER SUCCESS

Customer Journey Map Template



 TOTANGO



The Customer Journey



EXAMPLE

We've pre-filled the next two slides as an example for you to follow for the blank template on slides 7 & 8.



Adoption

Renewal

Expansion

Loyalty/Advocacy

Customer Activities

- Use Product
- Invite users to team
- Utilize additional functionality

- Contract Expiration

- Organic Growth - New Users/More Accts
- Adds use cases or integrations
- Requests additional support services

- Writes Review on 3rd Party Site
- Agrees to Case Study/Reference
- Refers Colleagues
- High NPS/CSAT
- Guest on Webinar

Customer Touchpoints

- Adoption email drip "Did you know?"
- User progress email
- CSM meetings

- Renewal reminder emails
- Escalation Management
- Winback Campaign
- Conduct QBR/EBR

- Upsell/Cross Sell communication
- User limits emails
- Solicit referrals

- 1:1 with Marketing
- CSM/AE emails
- NPS/CSAT Emails

Customer Pain Points/Friction

- Lack of understanding of feature
- Feature doesn't meet expectations

- Lack of visibility on renewal date
- Underutilization of the product
- Too many support tickets

- Stakeholders not on board
- No access to all potential stakeholders
- Lack of awareness of additional opp.

Customer KPIs

- License Utilization
- Customers Who Have Either Increased or Decreased Usage
- Feature Adoption
- Product Stickiness
- CSAT After Adoption
- Achievement of Desired Customer Adoption Outcomes

- Customer Health Score
- Renewal Rate
- On-time Renewal Rate
- At-Risk Customers

- Visits to pages providing tips on advanced features
- Advanced Feature Adoption Rate
- Support Tickets for Advanced Features
- Cross-Sell & Upsell Purchases & Conversion
- Customer Lifetime Value (CLV)
- Free Trial Sign-Ups from Word of Mouth

- Customer Retention Rate
- Customer Churn Rate
- CSAT
- Net Promoter Score (NPS)
- Referral Rate
- Referral Revenue

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Your Customer Journey Map



Awareness

Consideration

Conversion

Onboarding

Customer Activities

Customer Touchpoints

Customer Pain Points/Friction

Customer KPIs

Organic SEO
Paid Search
Social Media

Unique Visitors Newsletter Subs
New vs Returning Visitors
Scroll Depth
Time on Page Free Trial Subs
Bounce Rate Pricing Page Views
Exit Pages Free Trial Product Usage

Sales Conversions/Sales Revenue by...
Product
Referring Source
Prequalifying Information
First Time Buyers vs Repeat

Onboarding Completion Rate
Average # of Days in Onboarding
of Support Tickets During Onboarding
CSAT at end of Onboarding



Adoption

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Customer Activities

[Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

Customer Touchpoints

[Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

Customer Pain Points/Friction

[Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

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Tips & Tricks

- Color code to help you further organize your data
- Use lines to connect actions or express the flow a customer follows through the journey
- Clone the template and break out each phase so you can expound on it.
- Turn customer KPIs into a dashboard you can use to report on to your executive team on an ongoing cadence. (Or just use the dashboards we've already created for you in Totango. [Try now for free](#))
- Connect with your marketing team on an ongoing basis to make sure that the activities or message in the buyer's journey are aligned with the messages customers are getting during the customer journey.



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Everything you need to accelerate your customer success with the most widely adopted all-in-one Customer OS.

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