

Visualize The Journey

Customer Journey Map



A DIY Tool for
Teams from

ADage
Marketing Group

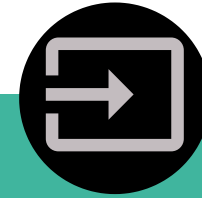
ACTIVITY OVERVIEW

WE'LL START BY REVIEWING WHAT WE KNOW ABOUT OUR "IDEAL" PROSPECT, SPEND TIME DEEPENING OUR UNDERSTANDING OF THEIR PERSPECTIVE, IDENTIFY THE CURRENT PROCESSES IN PLACES AND FINISH BY IDENTIFYING OPPORTUNITIES TO CREATE MORE CONVERSIONS!



PROSPECT

WHAT WE KNOW & WHAT WE NEED TO KNOW



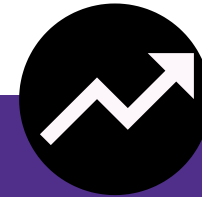
PERSPECTIVE

LOOKING FROM THE OUTSIDE IN



PROCESS

WHAT IS WORKING & WHAT'S NOT



PERFORMANCE

WHAT AREAS CAN WE IMPROVE

NEXT LEVEL

2022

Sales & Marketing Target Report



Report Content Overview

Section 1: Demographics

- Age
- Gender & Marital Status
- Ethnicity
- Analysis

Section 2: Attitudes

- Education
- Political Affiliation
- Religion
- Analysis

Section 3: Lifestyle

- Home
- Profession
- Income

Section 4: Persona

- American Royalty
- Silver Sophisticates
- Reaping Rewards

Persona Perspective

The Silver Sophisticate is most often moved by status-based positioning and reacts to community-oriented messaging. They are - and have been for quite some time - very comfortable in their homes and neighborhoods, so capitalizing on the initial momentum of inquiry will be the key to establishing a close-ready relationship.



SILVER SOPHIS

Persona Perspective

This Greatest Generation group is price-sensitive, socially conservative seniors. They planned for the future with a cautious eye on the nest egg they painstakingly accumulated and want guarantees wherever they can be found. Sell them on safety and close them with incentives.



REAPING REW

Use the accompanying 5-Step Process questions to fill in the chart below from each of the provided "prospect's" perspectives.

EXERCISE 1: UNDERSTAND THEIR PERCEPTIONS

	Single Widower	Comfortable Couple	Local Adult Children	Distant Adult Children
GOALS				
NEEDS				
OBSTACLES				
BELIEFS				

UNDERSTANDING THEIR PERSPECTIVE

QUESTIONS TO ASK

A 5-step Process

01

WHO THEY ARE

02

WHAT THEY BELIEVE

03

HOW THEY BEHAVE

04

HOW WE CONNECT

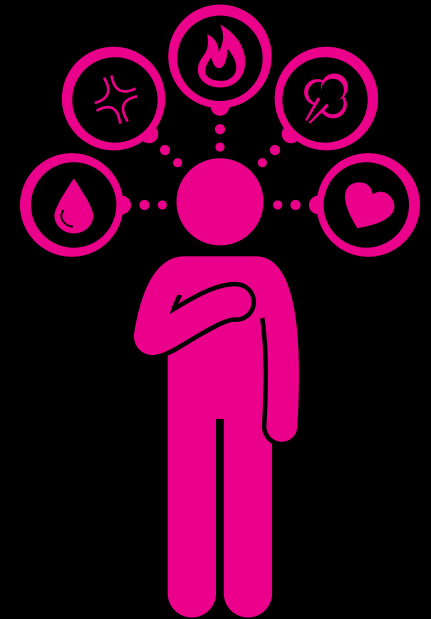
05

HOW WE COMMUNICATE

01

WHO THEY ARE

- **What do their perceptions about value tell you about their social class?**
- **Describe their education, past professions, interests and hobbies.**
- **What do they like or dislike, expect and prefer?**



02

WHAT THEY BELIEVE

Describe what you have heard prospects say that they:

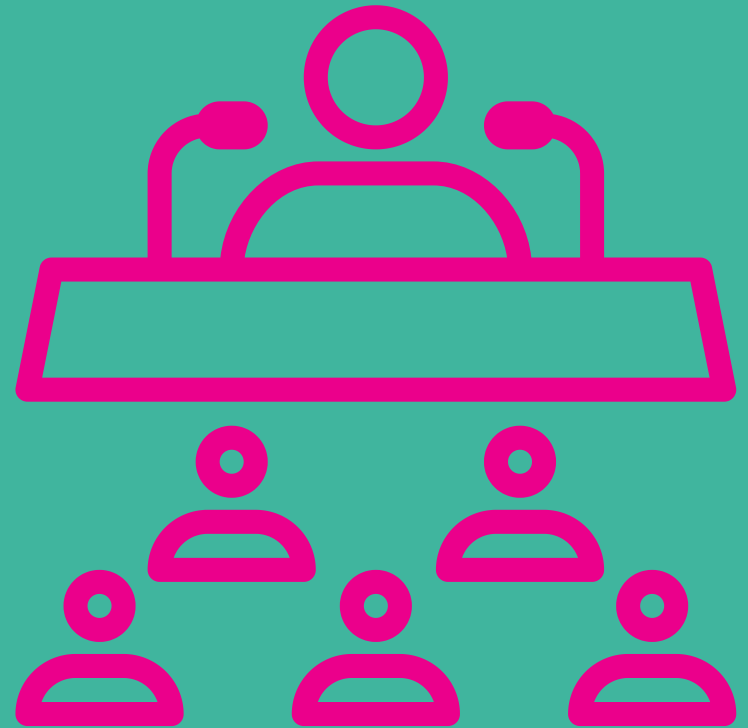
- **Feel?**
- **Need?**
- **Believe?**
- **Deny?**
- **Think?**
- **Expect?**



03

HOW THEY BEHAVE

- **What type of media do they take in?**
- **How do they use technology?**
- **Who do they interact with socially?**
- **Who influences them professionally?**



04

HOW DID WE CONNECT

- **Where did they first hear of your community?**
- **Have they received communications in the past?**
- **Describe the feedback you received on marketing materials during a tour (from pre-tour exposure).**
- **What is the driving force/experience that precipitated the initial connection?**



05

HOW DO WE COMMUNICATE



- **What is their preferred method of communication?**
- **How often are we in contact with them?**
- **What is our response time to them? Theirs to us?**
- **How long is the typical sales cycle?**

Exercise 2:

CJ(x) Interaction Evaluation

Customer Journey Maps can give an overview of the entire process, show how customers act/react and identify key moments of interaction between the user and the organization. For this exercise, complete the chart from the perspective of each person and yourself, using what you learned in Exercise 1.

	Single Widower	Comfortable Couple	Local Adult Children	Distant Adult Children
motivation (THEIRS)				
goal (YOURS)				
interaction (THEIRS)				
opportunities (YOURS)				

Financial

Emotional

Influencer

Logistical



USING THE Map TO IDENTIFY
COMMON

PAIN POINTS

COIN - CIRCLE OF INFLUENCE

The Customer Journey Map you just completed helped to identify where your role, as a salesperson, can guide the conversation forward by understanding where the prospect is "at" and meeting them there. Now, let's explore YOUR perspective on the interactions. Invite other team members to participate.


	Single Widower	Comfortable Couple	Local Adult Children	Distant Adult Children
TOUCHPOINTS "Moments of Connection"				
FRUSTRATIONS "Moments of Disconnection"				
PREDICTORS OF SUCCESS "Breakthrough Moments"				
NEXT STEPS "Lessons Learned"				

Exercise 3:

CJ(x) Tactical End-to-End

If you are already delivering a multichannel brand experience, here is where you identify the touchpoints that advance the sale using the attribution model you've adopted company-wide, i.e first touch, last touch, etc. Consider within this Marketing Model where the 'Pain Points' were identified and might be felt, as well as looking for ways to ensure continuity and alignment.

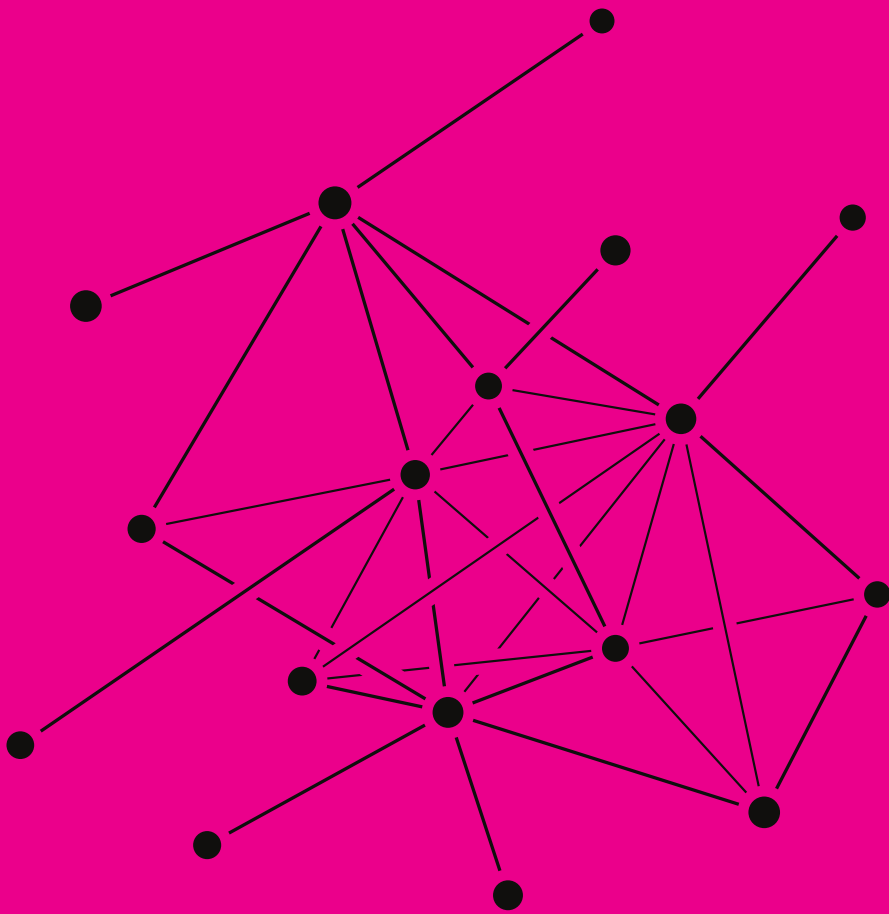
Exposure	Entry	Engagement (Excitement + Education + Encouragement) -->	End Game
Touchpoint	Action	Touchpoint	Action



Exercise 3: CJ(x) Map The Course

Bring it all together! Using what you know about your prospect from your Sales & Marketing Target Persona, combined with where they are in their personal journey and how they interact with your sales team/community, let's chart the course of Awareness to Advocacy.

	Awareness	Alternatives	Anticipation	Action	Advocacy
Thinking					
Feeling					
Doing					
Aggravation					
Advance					
Attention					



next steps

CONNECT THE DOTS

Upon completion of these exercises, reach out to the team at ADage Marketing Group to discuss what was learned and collaborate on ways to capitalize on challenges to keep the team advancing towards their 2022 Sales Goals