

**Customer Journey:
Their Path to Your Success**

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Agenda

- In today's session, we will discuss:
 - What the Customer Journey is
 - Why it matters greatly to your business
 - How to evaluate your Customer Journey
 - Steps to take to improve your Customer Journey

Learning Objectives

- During this session, attendees will learn to:
 - Evaluate processes and systems vs. ideal client expectations
 - Increase bookings by improving systems & processes
 - Save money by eliminating unnecessary systems & processes



One winner will win a two-hour strategy session with me (\$250 value)

Drop your business card into the bag

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Heading out for dinner?

Care most about the meal...

What about:
Service speed, ambiance, server friendliness, cleanliness, initial wait time, parking, etc.



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Amazing images, but...

- Poor communication
- Was difficult to work with
- Pictures took forever to get
- And expensive

➤ Bad taste in your mouth!



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What is the Customer Journey?

They find you, until either:

- They stop working with you (don't hire you)
- You stop working with them (job complete)

Their path = your systems and processes

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Expected outcome is first and foremost

But their experience in the journey results in:

- Perception and Value
- Difference between 3 & 4 star, or 4 & 5 star review!

Your business is more than its end product!

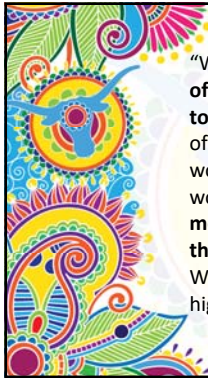
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"... We are so thankful that we chose Personal Touch Dining to handle our catering and event rentals. **They are truly a pleasure to work with, very knowledgeable and professional.** Our tasting was an amazing experience, set up like a private dinner complete with wine, and the food is great! **Communication with all of the PTD team was prompt and thorough throughout the planning process,** they would often respond to my emails within hours! Aside from preparing and serving delicious food (rave reviews from all of our guests) **they helped us with planning and design and also referred vendors.** On our wedding day they went above and beyond, preparing to go bags of apps, dinner, and desert for my husband and I (we were too excited to eat!). We will definitely consider Personal Touch for any future catering needs! - WeddingWire review for Personal Touch Dining

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“Working with Matt was one of the easiest parts of planning our wedding. His online planning tools made the process so easy and we had a lot of fun doing our final sit-down with him and working out the final details. Matt had never worked at our wedding venue before, so he also met with us to do a walk-through and check out the site in advance, so he would be prepared... We could not be happier and could not give him a higher recommendation.” - Review for Choice Entertainment

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Has to match expectations!

Burger King vs. Echo Gastropub
Expectations = value you give it.




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Why Focus on Customer Journey?

1. Improve their perception of experience – reviews, referrals, and offsets minor issues
2. Improve ROI on time per client
3. Improve vendor relations

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While not sexy...
Systems and process
evaluation & improvement
ARE essential to the long-term success
and profitability of your business!

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**“They were very professional,
responsive and easy to work with,
and sounded beautiful in the
Cathedral!! Thank you Eliana
Strings!”**
- WeddingWire review for Eliana Strings

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My daughter's wedding planning was
a breeze thanks to Continental
Catering. They took care of
EVERYTHING and EVERYTHING was
wonderful... Kristie-AWESOME! Food-
AWESOME! Service-AWESOME!
- WeddingWire review for Continental Catering

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Why Focus on Customer Journey?

And...

- 4. Better booking conversion rate
- 5. More repeat and follow-on business

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"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

- Maya Angelou

What we do is personal. And matters greatly to them.

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time to evaluate

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What first?

Know who your ideal client is.

Must meet or exceed THEIR expectations.
Any changes should bring you closer to those.








Then what?

Map the paths – documenting all the ways they can enter and go.




e.g. Initial Inquiry:
Phone call, contact form, email, text, at a show, via an event planner, through WeddingWire...

How often?

If frequently, systematize:
consistent results & time savings
e.g. email templates or online questionnaires

If infrequently, make a note.







Understand Your Clients!

Read their reviews:
Any part of your process mentioned as positive or negative?

Survey them

WHAT OUR CUSTOMERS ARE SAYING

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Talk to Other Vendors

- What they like
- Their frustration points





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Can't do business how you want, but **how they want or expect!**
Focus on Ideal Client

Differences for:

- Millennials
- LGBTQ
- Lower budget
- Higher budget





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**Has to be genuine:
to you
and to the business that fits you best.**

Can't maintain anything else for long!





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Decide What Needs to be Changed

If overall process is good – or can't make big changes now:
look for HIGH ROI ITEMS

- Used frequently
- Low degree of client satisfaction
- Can be automated
- Can cut without loss in satisfaction





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Start at the Beginning...
 ...When they find you!
 First impressions matter
So set the tone from the start
 How are you answering your inquiries?
 Do you use electronic contracts and accept online payments?

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Communicate...
 ...And set expectations properly!

“We aim to reply to all emails within X hours, but during wedding season it is often Y.”

**Then communicate with anything you can by X.
 And reply fully before Y!**

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If a big change is necessary...
 (new website or customer management system)

- Make a plan, understanding time and cost
- Make it a priority
- Hire help to implement
- Focus on functionality **and resulting client experience**

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Summary

- Your business is more than your end product!
- The Customer Journey is about their expectations and their perception
- Can mean the difference in reviews and referrals, ROI per client, better vendor relations, better conversions, and more repeat business
- Needs to focus on Ideal Client
- Map your customer journey & touchpoints
- Systematize what makes sense for you & ideal client

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Your Next Steps

- Map your customer path and touchpoints
- Read through your past year's reviews
- Talk to vendors you work frequently with

And change one thing at a time to make it a better 2017 and an even better 2018!

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