

It's the Journey Not the Destination

The Power of Customer Journey Mapping

PRESENTED BY



Katlin Hess

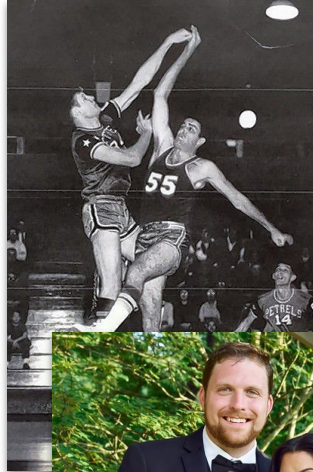
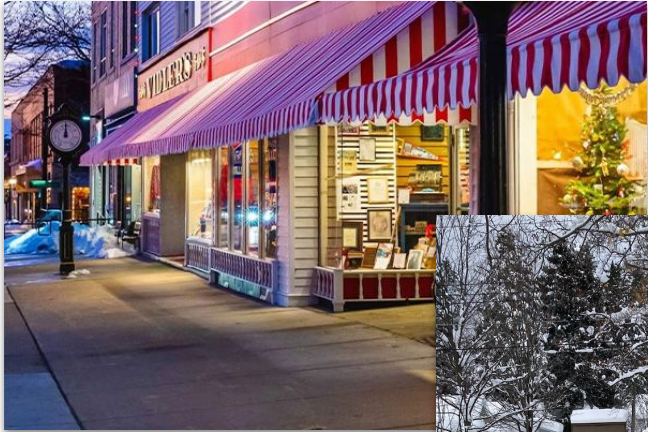
Director of Customer Marketing



Katlin Hess

Director, Customer Marketing @ G2

My Not Normals



CONFIDENTIAL



Agenda

Understanding Journey Mapping

Why we do it, how we use it

Building Your Map

High level mapping, workshops

What our Map Looks Like

Where we landed

How we're using it

The impact our map is having





Understanding Customer Journey Mapping



What is a journey map?

A visual documentation of our customer journey from end to end.

More importantly, this journey map is a **tool** that we can use **to improve our customer experience.**



Why do we journey map?

- To understand the *real* journey of our customers
- To uncover friction points for customers
- To identify duplicative efforts or inefficiencies
- To stress test new products, processes or services
- To identify potential changes to improve the customer experience



The Results of Journey Maps

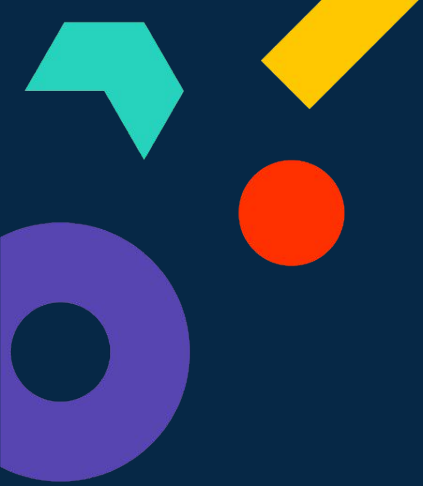
- Improved customer experience
- Increased customer loyalty
- Increased conversion rates
- Better communication
- Greater cross-functional collaboration



Keys to Journey Mapping

- Set parameters, build your plan
- Get buy-in from leadership
- Assemble the right internal team
- Leverage customer feedback
- Create clear & actionable outcomes





Building Your Map

(or at least how we did it)



Building Our Map

- Leadership conversations
- Frontline Sales/CS Workshop
- Explore real customer journeys
- Customer Interviews



Our Mapping Team



**Product
Marketing**



**Customer
Success**



**Customer
Support**














**Relationship
Managers**



**Sales
Enablement**



Milestone	Enter Onboarding	Onboarding Complete	NPS
Actions What does the customer do?	<div data-bbox="459 219 552 314">Complete onboarding survey</div> <div data-bbox="581 219 674 314">Engage in G2U</div> <div data-bbox="703 219 795 314">Meet with account team</div>	<div data-bbox="971 219 1064 314">Completed Onboarding</div> <div data-bbox="1093 219 1186 314">Engaged with G2U</div> <div data-bbox="1215 219 1307 314">Actively using the product</div>	<div data-bbox="1599 219 1692 314">Completes NPS survey</div>
Touchpoint What part of the service do they interact with?	<div data-bbox="407 377 500 472">G2U</div> <div data-bbox="529 377 622 472">Marketing emails</div> <div data-bbox="647 377 739 472">CSM / RM</div> <div data-bbox="765 377 857 472">MyG2</div>	<div data-bbox="915 377 1008 472">G2U</div> <div data-bbox="1037 377 1130 472">Marketing emails</div> <div data-bbox="1155 377 1248 472">CSM / RM</div> <div data-bbox="1273 377 1365 472">MyG2</div>	<div data-bbox="1599 377 1692 472">Delighted Survey</div>
Customer Thought What is the customer thinking?	<div data-bbox="515 530 608 625">Excited to start</div> <div data-bbox="633 530 726 625">Looking for value</div> <div data-bbox="751 530 844 625">Nervous about work to implement</div>	<div data-bbox="1022 530 1114 625">Excited to be onboarded</div> <div data-bbox="1139 530 1232 625">Looking for value</div>	<div data-bbox="1443 530 1535 625">Happy to be a customer</div> <div data-bbox="1586 530 1678 625">Not seeing full value</div> <div data-bbox="1729 530 1821 625">Has an issue that needs to be addressed</div>
Customer Feeling What is the customer feeling?			  
Opportunities	<div data-bbox="407 836 500 931">Collect stakeholder contacts</div> <div data-bbox="529 836 622 931">Capture goals</div> <div data-bbox="647 836 739 931">Opt-in to email programs</div>	<div data-bbox="915 836 1008 931">Approach for review on G2</div> <div data-bbox="1037 836 1130 931">Invite to upcoming engagements</div> <div data-bbox="1155 836 1248 931">Consider for reference program</div>	<div data-bbox="1443 836 1535 931">Approach for reference or customer story</div> <div data-bbox="1599 836 1692 931">Address in upcoming touchpoint, Personal follow-up if needed</div> <div data-bbox="1729 836 1821 931">Personal follow-up from RM, CSM or Leadership</div>

Renewal	Customer Churns	New Admin	Low Adoption
<p>Indicates plans to renew</p> <p>Signs contract</p>	<p>Indicates non-renewal</p> <p>Does not sign contract</p>	<p>New G2 Admin starts</p>	<p>Customer has not logged into myG2 in 30+ days</p> <p>No new reviews in 60+ days</p>
<p>Email from RM</p> <p>Auto-mated email if no engagement</p>	<p>Conversation with RM</p> <p>Automated Churn Survey Email</p>	<p>G2U</p> <p>MyG2</p> <p>RM / CSM</p> <p>Email Campaigns</p>	<p>MyG2</p> <p>RM / CSM</p> <p>Email Campaigns</p>
<p>Excited for continued partnership</p>	<p>We don't see value from G2</p>	<p>This could be a lot of work</p> <p>I don't know what G2 is or how to use it</p>	<p>Not seeing value</p> <p>Not thinking about us at all</p>
		 	 
<p>Celebrate wins to double down on value</p> <p>Approach for case study</p> <p>Ask to join reference program</p>	<p>Respond to churn survey</p> <p>Address issues to win customer back in the future</p>	<p>Invite to bi-weekly training sessions</p> <p>Onboarding nurture stream</p> <p>Checkin with CSM / RM</p>	<p>Monthly Digest email</p> <p>Adoption email campaigns</p> <p>CSM / RM Intervention</p>



	Onboarding	Adoption	Upsell	Renewal	Advocate
Account Executive	Closes deal, identifies onboarding contacts				Identify potential advocates
Support		Replies to tickets, provides self-serve content in community, monitor support CSat responses			
Customer Success	Kickoff call, bi-weekly onboarding training sessions (SMB)	QBRs, supports campaigns, main POC for issues			Identify potential advocates
Account Manager	Kickoff call, support during onboarding	QBRs	introduces new products, has growth and renewal conversations		Identify potential advocates
Product		In-app product messaging, monthly user digest, NPS, in-product feedback			
Marketing	Onboarding nurture stream	Adoption content/campaigns, customer newsletters, office hours	Product announcements, webinars, content	Celebrate renewal, Automated renewal sequences (as needed)	Approach for case study, CAB or PAC





➤ MILESTONES & FRICTION POINTS

Onboarding

Milestone

New Admin

Friction point / opportunity

Low Adoption

Friction point / opportunity

Anniversary

Milestone

Renewal

Milestone

Advocacy

Milestone



Customer: Onboarding

Doing

- Updating the Profile
- Gathering a customer list for the review campaign
- Bringing in new POCs for Integrations
- Learning about profile tools
- Attending kick off call
- Integrations install/training as needed

Thinking

- Which customers should I reach out to for reviews?
- How do I log a support ticket?
- Did I complete my profile?
- Who can I talk to for help on strategy?
- How much time will this take?

Feeling

- Excited
- Overwhelmed
- Annoyed
- Curious
- Confused



G2: Onboarding

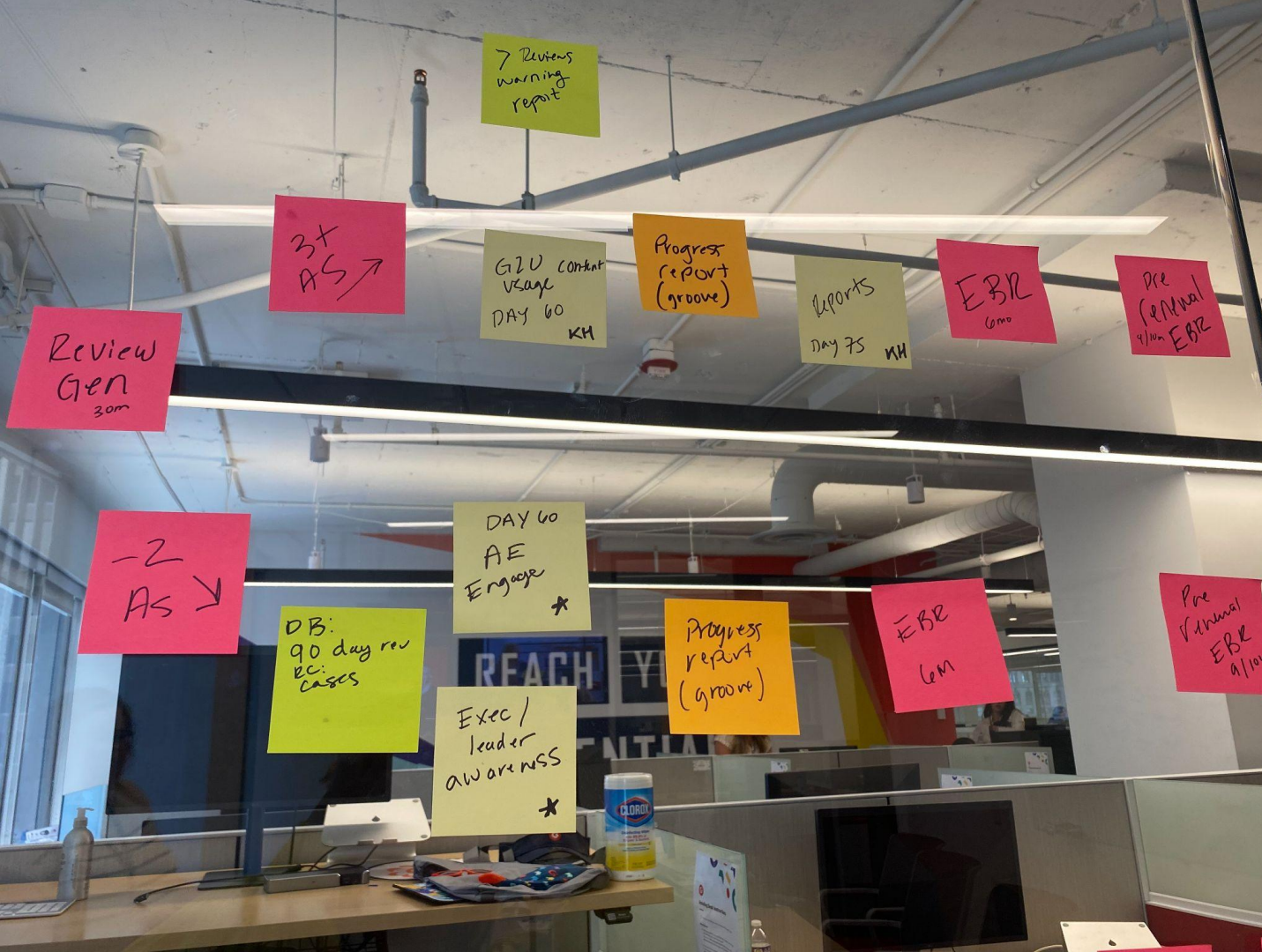
Touchpoints & Owners

- AE and customer > close deal
- AE and RM/CSM > AE to email all + customer to set up KO call
- CSM +RM run KO call
- CSM set up the next 2 onboarding calls and kickoff review campaign
- Marketing - Welcome email

Opportunities

- There is a lot of scheduling and subsequent calls that sometimes fall through the cracks alongside follow up of getting a review campaign up and running. Need to find a way to streamline
- Onboarding should be a firm 30 days - what can we do to make sure customers KO a review campaign?
- Revamp onboarding survey - capture customer goals, track in Salesforce
- Build onboarding nurture stream
- Revamp kickoff call deck
- Automate onboarding comms (SMB)





7 Reviews
warning
report

3x
AS →

GIU content
usage
DAY 60
KH

Progress
report
(groove)

Reports
Day 75
KH

EBR
Com

Pre
Final
9/10
EBR

Review
Gen
30m

-2
AS ↓

DAY 60
AE
Engage *

DB:
90 day rev
cc:
cases

Exec /
leader
awareness *

Progress
report
(groove)

EBR
Com

Pre
Final
EBR
9/10



“Spot check” with real customers



- Does their experience match what's on our map?
- What does the timeline look like?
- Are there things we missed?



Customer Interviews

- 2 from each segment
- Validate/disprove findings
- Uncover what you may have missed

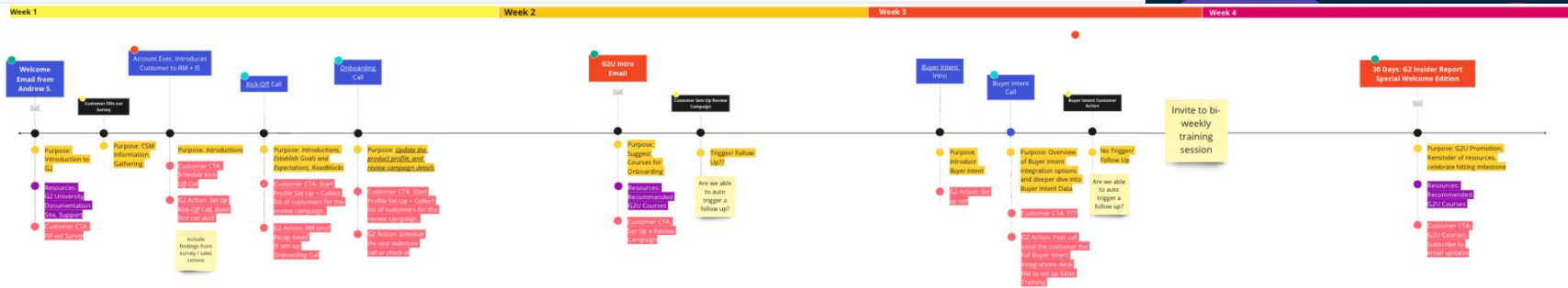




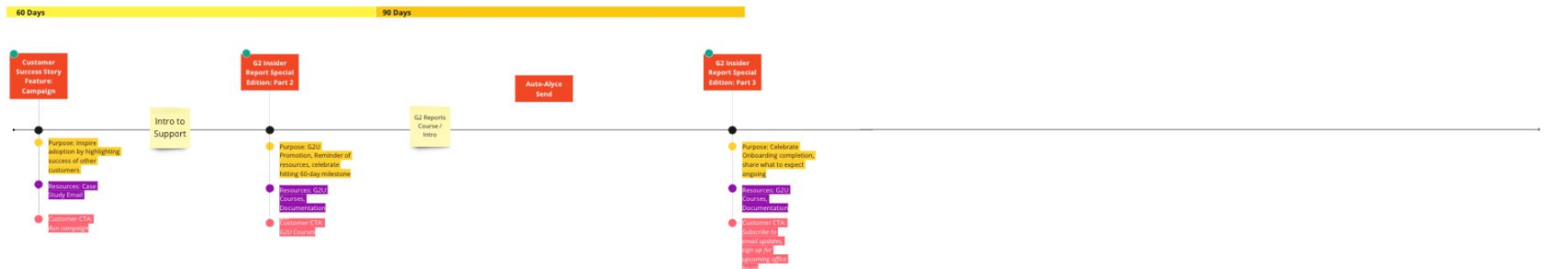
**What does our map look like and
how do we use it?**



Recommended Onboarding Workflow



Recommended Onboarding Workflow [Monthly view]



Sample Year in Customer Comms

This shows what a typical year for a new customer who onboarded Jan 1 would look like in terms of customer comms from Marketing.

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Week 1: Welcome Email	Week 1: Intro to Support	Week 1: Intro to G2 Reports Course	Week 1: BetterCloud Case Study; BI Upsell email	Week 1: ZoomInfo Webinar invite	Week 1: Buyer Intent Lookback offer Market Intelligence Demo Invite
Week 2: Introduction to G2U	Week 2: Customer Guide: Floqast Review Gen	Week 2: Onboarding Complete	Week 2: Monthly Product Digest NPS Survey	Week 2: Monthly Product Digest	Week 2: Monthly Product Digest G2U Certs Launch Summer Report Release
Week 3: Monthly Office Hours Invite	Week 3: Monthly Office Hours Invite	Week 3: Monthly Office Hours Invite	Week 3: Monthly Office Hours Invite	Week 3: Monthly Office Hours Invite Summer Report Announcement	Week 3: Monthly Product Digest G2U Certs Follow-up
Week 4: Insider Report: Welcome Edition	Week 4: Insider Report: Onboarding Edition	Week 4: Insider Report: March Edition Spring Report Release Annou.	Week 4: Insider Report: April Edition	Week 4: Insider Report: May Edition CMO Consult Webinar Invite Summer Draft Release Announ.	Week 4: Insider Report: June Edition
JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Week 1: NPS Request	Week 1: Salesoft integration launch Fall Report Announcement	Week 1: Invite to Customer-led Growth Webinar	Week 1: 90-day auto- renewal comms	Week 1: 60-day auto- renewal comms	Week 1: 30-day auto- renewal comms
Week 2: G2U Certification Spotlight Monthly Product Digest	Week 2: Invite to Product Town Hall Monthly Product Digest	Week 2: Fall Report Release Monthly Product Digest	Week 2: Monthly Product Digest NPS Survey	Week 2: Monthly Product Digest Monthly Office Hours Invite	Week 2: REACH Invite Invite to Product Town Hall Monthly Product Digest 15-day auto- renewal comms Winter Report Release
Week 3: Monthly Office Hours Invite Pros & Cons release	Week 3: State of Software Email	Week 3: Monthly Office Hours Invite	Week 3: Monthly Office Hours Invite	Week 3: Insider Report: November Edition Winter Report Announcement	Week 3: Insider Report: December Edition
Week 4: Buyer Behavior Report Insider Report: July Edition	Week 4: Fall Draft Release Announcement Insider Report: August Edition	Week 4: Insider Report: September Edition	Week 4: Insider Report: October Edition	Week 4: Winter Draft Release Announ.	Week 4: Auto-renewal final notice

Key:

Automated
Onboarding Nurture
Stream

Report Comms

Automated Auto-
renewal emails



Adoption: Content

- Monthly User Digest
- Office Hours
- Customer Playbooks
- G2U Onboarding Courses





G2's Online Support Community

Take advantage of the Online Support Community, a place where you can learn and raise your hand to get help without having to go through a support manager.

[Learn more >](#)



G2 Document Library

Make the most out of your G2 experience with our Document Library, articles walking you through the G2 review collection, and more.

[Check it out >](#)

Best of the Rest



G2 Office Hours

Join these conversational sessions to learn, network, and find new ideas. You'll hear from our experts and your peers on the strategies and best practices you need to make your G2 experience a success.

[Watch past sessions >](#)



[View in browser](#)

G2 Insider Report

Welcome to your very first edition of G2's Insider Report – just for G2 customers! These emails will be your monthly dose of all things G2, designed to equip you with the skills and insights you need to make the most of your G2 journey.

Each month we'll feature product updates, links to educational resources, and tips and tricks for getting stuff done on G2.

This month we'll be sharing everything you need for a successful G2 onboarding!



Learning & Resources



G2 University

Rise to the top of the class at G2 University. Explore our growing library of courses to help you get started with G2 faster. From the anatomy of a profile to launching review campaigns, there's something for everyone at G2U!

[Enroll today >](#)



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The G2 Reports seminar is now in session.

Hi there,

It's almost midnight. Three drafts on the floor, and you're still some work before a deadline.

We've all been there before. That's why we never want you to be. G2 University's Preparing for G2U.



[View in browser](#)

Boost your review count by 312%.

Yep, you read that right.

Hi there,

What if I told you that achieving a 312% increase in authentic reviews is possible? It's true, just ask FloQast and The Captivate Collective.

In collaboration, they accomplished these results using a comprehensive marketing plan. Targeting audiences, multi-channel review asks, engaging customers, and fostering internal alignment were four strategies that made their campaign a success.

Essential Package Playbook

Package Based Playbooks Spot Play Updated 2 months ago Internal

Essential Package Playbook

These are the key moments that make up an Essential customer's journey from start to finish. Each moment has its own dedicated guide you can access via the navigation buttons below.

Purple= RM + CSM motion

Teal= CSM motion

Yellow= RM motion

1. Kick-Off Call
2. Review Generation Strategy Call
3. Onboarding Close & Matik Reports

Mark: Adoption Score of 2 or Lower?

playbook

to enroll in the following G2 University learning Review Rundown, and Profile Performance & Lead

needed, seek help from your manager

ertification: G2 University

! Super User. Master everything, from profiles through category taxonomies. A must for any G2 customer!

ing Certification: G2 University

to optimize and measure the impact of your G2 profile, re reviews, build stronger relationships with your arness the voice of your customers, and learn best...

60 Day Mark: Adoption Score of 3 or Higher?

- CSMs: keep rocking and rolling with the playbook steps!
- Be on the lookout for whether this customer would be a solid case study submission

G2 Customer Story Nomination Form

Have a customer who'd be great for a case study? Submit this quick-internal- case study form to get your customer in the customer story...

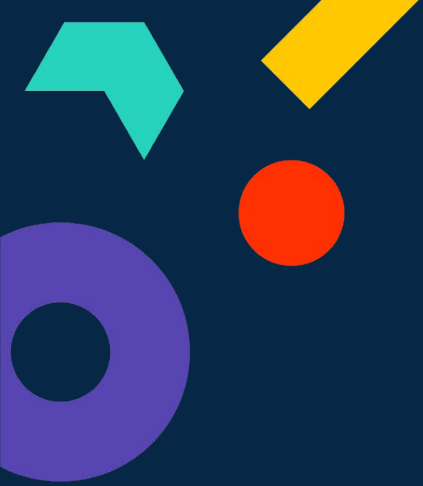
- RMs: check out the upsell playbooks below:

Buyer Intent Upsell Playbook

Content Upsell Playbook (Coming Soon!)

4. 6 Month Business Review
5. Pre Renewal Business Review
- 6a. Secure the Renewal





Let's Try It





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Customer: MILESTONE

Doing

Thinking

Feeling



Customer: MILESTONE

Touchpoints & Owners

Opportunities





Anyone willing to share?





Thank you

Let's Connect!

<https://www.linkedin.com/in/katlinhess/>

