Build Your Patron Journey
Leading Patrons on the Path to Greater Engagement
Paul Miller
The Customer Journey
88% of senior-level marketers say that it’s absolutely critical to create a cohesive Customer Journey.

Salesforce
Today’s Workshop

1. What’s on the map?
2. Who’s on the trip?
3. A sample itinerary
4. Building your journey
Complete our survey and enter to win!
What’s on the map?
The Customer Journey

Evangelism

New Patron → Known User → First Purchase → Repeat Purchaser → Evangelist
Customer Journey Mapping

Though they share the same concepts, there are many kinds of Journey Maps:

- Customer Journey Map
- User Journey Map
- User Experience Map
- User Touchpoint Map
Journey Map Ingredients

While Journey Maps vary, there are a few key components that are often included:

1. Review Goals
2. Gather Research
3. List Customer Touchpoints and Sales Channels
4. Develop and Conduct an Empathy Map
5. Brainstorm the Journey via the Customer’s Lens
6. Complete an Affinity Diagram (Persona)
7. Sketch the Customer Journey
8. Refine and Digitize the Journey
9. Share the Journey Map
Single Journey Map

CUSTOMER JOURNEY MAP THROUGH “RED & WHITE”
This journey map documents the experience of an irregular shopper at the Red & White Grocery Store in Habersham Village.

PROMPT: Need for Food

PAKING

ENTER

SHOPPING THROUGH AISLES

CHECKOUT

EXIT

TAKEAWAYS
Groceries, Receipt

Documented by Kari Dole Smith
Multi-Path Journey Map
Who’s on the trip?
Creating the Scenario

Susan Marshall
## Creating the Proto Persona

<table>
<thead>
<tr>
<th>1. Name &amp; Illustration</th>
<th>2. Demographics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong> Ilena Piante</td>
<td><strong>Female</strong></td>
</tr>
<tr>
<td><strong>Age:</strong> 35 years old</td>
<td><strong>Married</strong></td>
</tr>
<tr>
<td><strong>Occupation:</strong> Intelligence Specialist</td>
<td><strong>Married</strong></td>
</tr>
<tr>
<td><strong>Loves to play</strong></td>
<td><strong>Living in Arlington, VA</strong></td>
</tr>
<tr>
<td><strong>Very social</strong></td>
<td><strong>Intelligence Specialist</strong></td>
</tr>
<tr>
<td><strong>Fear of travel</strong></td>
<td><strong>Loves to travel</strong></td>
</tr>
<tr>
<td><strong>Stressed by lack of control</strong></td>
<td><strong>Insufficient control</strong></td>
</tr>
<tr>
<td><strong>Motivated by strong goals</strong></td>
<td><strong>Lacks a sense of purpose</strong></td>
</tr>
<tr>
<td><strong>Works well in a team</strong></td>
<td><strong>Prefers working alone</strong></td>
</tr>
<tr>
<td><strong>Conscientious</strong></td>
<td><strong>Needs a sense of order</strong></td>
</tr>
<tr>
<td><strong>Smart, facing, organized</strong></td>
<td><strong>Needs to be organized</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Needs &amp; Goals</strong></td>
<td><strong>Lacks a sense of purpose</strong></td>
</tr>
<tr>
<td><strong>Lacks a sense of control</strong></td>
<td><strong>Needs to be organized</strong></td>
</tr>
<tr>
<td><strong>Lacks a clear sense of identity</strong></td>
<td><strong>Needs to be encouraged</strong></td>
</tr>
<tr>
<td><strong>Lacks a clear sense of direction</strong></td>
<td><strong>Needs to be supported</strong></td>
</tr>
<tr>
<td><strong>Lacks a clear sense of purpose</strong></td>
<td><strong>Needs to be challenged</strong></td>
</tr>
<tr>
<td><strong>Lacks a clear sense of identity</strong></td>
<td><strong>Needs to be mentored</strong></td>
</tr>
<tr>
<td><strong>Lacks a clear sense of direction</strong></td>
<td><strong>Needs to be guided</strong></td>
</tr>
<tr>
<td><strong>Lacks a clear sense of purpose</strong></td>
<td><strong>Needs to be coached</strong></td>
</tr>
</tbody>
</table>
Creating the Empathy Map

**The Empathy Map**
Map your target audience properly

1. What do they dream of?
2. What is their ambition?
3. What makes them feel bad? And good?
4. What do they want to change?
5. What frustrates them and what motivates them?
6. How do they feel they did a good job?

**Think & Feel**
1. What do their friends say?
2. What influences them?
3. Which media do they use?
4. Who gives them challenges?
5. How do they get access to their knowledge?
6. With whom do they work?
7. How do they work together?
8. How do they hear that they’re appreciated?
9. How do they socialize?

**General data**
- Age
- Sex
- Family
- Income
- Residence etc.

1. What does their environment look like?
2. Where do they work?
3. Which media do they use?
4. How do they experience that they’re appreciated?
5. How do they contact their surroundings?

**Hear**
1. What kind of addictions do they have?
2. What does their environment say and do?
3. What do they talk about with their colleagues?
4. What do they do in their spare time?
5. What does their day look like?

**Say & Do**

**Gain**
What does the target audience want to reach, how do they measure success? Desires, needs, measure of success?

**Pain**
What are the fears, frustrations and obstacles or challenges that the target audience faces?
Creating the Empathy Map

Empathy Map

THINK & FEEL?
- Life is the constant battle between work that is affirming, rewarding, and creative with the fact that there are few avenues to create art sustainably long term
- Having a lot of varied experiences and not being "trapped" in a mundane life cycle matters most to her

HEAR?
- Influencers speak through successful work; not interested in the academic side of things as much as production of cultural significance
- Friends are hyper-literate and she must keep up culturally to understand their references
- If not her own boss, she works with people she's comfortable addressing as peers

SEE?
- Photographic eye makes her very attuned to environment and aesthetic surroundings
- Market is all about discernment, both in being picky about careers and what she consumes
- Selective group of close friends that she trusts their opinion

SAY & DO?
- Strong opinions and unafraid to make value judgments
- Concerted attempt to cultivate a "non-traditional" look and individual style
- Generally not confrontational, but will defend topics of interest vigorously

PAIN
- Impressive work by peers just as likely to make her doubt his own skills as it is to inspire her
- Frustrated by having to compromise artistic vision to fit commercial goals in industry
- Obstacles include lack of viable careers

GAIN
- Needs fulfillment through unrestricted creativity and autonomy in life
- Measure success by opinions of respected peers and her own sense of worth
- Prestige weighs more than monetary success
Aggregating Market Psychographics

The most common segments for ZIP Code 91208, Glendale, CA are:

- Upper Crust: Wealthy Older w/o Kids
- Movers & Shakers: Wealthy Older w/o Kids
- New Empty Nesters: Upper Mid(Scale) Mature w/o Kids
- Pools & Patios: Upper Mid(Scale) Older w/o Kids
- Young Influentials: Midstage Middle Age w/o Kids

Click on the segment names for more detail.

[Population by Race & Ethnicity chart]

Click to log in to view segments in order of their predominant concentration of households within the selected ZIP Code.
Aggregating Market Psychographics

https://segmentationsolutions.nielsen.com/mybestsegments/
Creating the Final Persona Target

Susan Marshall

**Motivation**
- Incentive
- Fear
- Achievement
- Growth
- Power
- Social

**Bio**
Susan grew up in Natick, Massachusetts and went to University of California, Los Angeles as a Business Major. She met her husband at college. They married at 20 years and her oldest child is 14. Her parents still live in Massachusetts and her only sister lives in Boise, ID. She is actively engaged in her children’s school and serves as PTSA co-President at the Middle School.

**Goals**
- Raise three outstanding children
- To make sure arts & culture are important in their family’s lifestyle
- Financially support the things she loves

**Personality**
- Introvert
- Analytical
- Conservative
- Passive
- Leader

**Frustrations**
- Lack of time for things she cares about
- Will not tolerate bad technology
- Lack of arts education in public schools
- Will not put up with poor customer service

**Behaviors**
- Constantly on the move
- Regular user of social media
- A planner, but, can be spontaneous to surprise others

**Brands**
- Target
- Toyota
- Disney

**Preferred Channels**
- Traditional Ads
- Online & Social Media
- Referral
- Guerrilla Efforts & PR
Make the Journey the Reward

Create 1:1 Customer Journeys

THE FUTURE OF MARKETING IS 1:1 CUSTOMER JOURNEYS
Making the Journey the Reward

Random Acts of Kindness
Random Acts of Kindness

• Free Coupon for Drinks
• Free Tickets
• Treat in Your Seat
• Personalized Visit
• Hand Delivered Gift
• Invitation to unique one-of-a kind experiences
• Special and Unique Discounts and Offers
• Public Thank You
• What do you do?
Kindness is a Two-Way Street

- Buy a ticket
- Become a subscriber
- Bring a friend
- Write a review
- Become a member
- Make a gift
- Help fundraise
- What do you ask for?
Journeys are correlated with results

- +36% Customer satisfaction
- +19% Likely to stay/renew
- +28% Willingness to recommend
- +33% Less likely to cancel/churn

*Transforming Customer Experience: From Moments to Journeys, 2013*
Four Questions

Do you know who your customers are?

Where are they in their journey?

Are you engaging and moving them along the journey?

Are you measuring the impact on your business goals?
Summary of Customer Journey

- Build a single view of the customer
- Plan and optimize the customer journey
- Deliver personalized content across every channel and device
- Measure the impact on your business
How Does it Work?

Journeys
- Maps
- Interactions
- Metrics

Content
- Asset Management
- Workflow & Approvals
- Versioning

Analytics
- Reporting
- Dashboards
- Web & Mobile Analytics

Contacts
- Contact Management
- Segmentation Tools
- Events and Triggers
- Predictive Intelligence

Channels
- Email
- SMS/MMS
- Push Notifications
- Social Advertising
- Web Experiences
- Group Messaging

Apps
- Connected Apps
- Connected Products
- Connected Spaces
Let’s take a trip
“We need to better serve our current customers and increase our primary market share”
Susan Marshall

Bio
Susan grew up in Natick, Massachusetts and went to University of California, Los Angeles as a Business Major. She met her husband at college. They married at 25 years and her oldest child is 14. Her parents still live in Massachusetts and her only sister lives in Boise, ID. She is actively engaged in her children's school and serves as PTO co-President at the Middle School.

Goals
- Raise three outstanding children
- To make sure arts & culture are an important part of our family's lifestyle
- Financially support the things she loves

Frustrations
- Lack of time for things she cares about
- Will not tolerate bad technology
- Lack of arts education in public schools
- Will not put up with poor customer service

Behaviors
- Constantly on the move
- Regular user of social media
- A planner. But, can be spontaneous to surprise others.

Motivation
- Incentive
- Fear
- Achievement
- Growth
- Power
- Social

Brands
- Target
- Subaru
- Toyota
- Dillard's
- Disney

Preferred Channels
- Traditional Ads
- Online & Social Media
- Referral
- Guerilla Efforts & PR
Meet Susan

42 year-old, mother of three

Theatre enthusiast

Planning Family Theatre Outing

- Get Theatre Tickets for family
  - Finalize Hotel
  - Shop for clothes for kids
  - Make reservation at Carmine's for dinner
Susan Starts Her Journey with Google
Susan’s search leads her to the Lab Theatre of Los Angeles, CA
Susan explores the Lab Theatre’s website.
She joins the mailing list

Susan Marshall

GENDER: Female
ENTRY: Search
INTERESTS: Theatre and Fine Arts
PRODUCTS: Dramas, Shakespeare
EMAIL: smarshall@gmail.com
LOCATION: Glendale, CA
Hello and Welcome to The Lab Theatre! We are thrilled to have you as a new patron and look forward to seeing you at the Theatre. And do not miss our production of Romeo and Juliet, which has been called a "tour de force" by the Los Angeles Times. Call our office now,
She receives targeted offers through the mobile app and makes her first purchase.

Susan Marshall

- **GENDER:** Female
- **ENTRY:** Search
- **INTERESTS:** Theatre and Fine Arts
- **PRODUCTS:** Dramas, Shakespeare
- **EMAIL:** smarshall@gmail.com
- **LOCATION:** Los Angeles, CA
- **JOURNEYS:** Welcome
- **MOBILE:** App Installed
Dear Susan,

Congratulations on your first planned trip to The Lab Theatre. Your performance of Romeo and Juliet is coming up on Saturday, October 1st at 8:00pm. This is your reminder to be at the theatre by 7:30 pm to pick up your tickets.

Christine Abraham, The Lab Theatre
Saturday, October 1, 2017 at 6:44 PM

Reminder...Your Performance of Romeo and Juliet is coming up on...  3:20 PM

She gets a personalized reminder and congratulations on her first purchase.
Susan’s experience is enhanced through mobile

Susan Marshall

GENDER: Female
ENTRY: Search
INTERESTS: Theatre and Fine Arts
PRODUCTS: Dramas, Shakespeare
EMAIL: smarshall@gmail.com
LOCATION: Glendale, CA
JOURNEYS: Welcome, 1st Purchase, 1st Visit

Lab Theatre Msg: Congrats on your first visit to The Lab Theatre. Your first drink is on us. Come by The Lab Theatre bar to pick up your Beverage.
Dear Susan,

Thank you for attending Romeo and Juliet on Saturday, October 1st at 8:00pm. We hope you enjoyed the production. Please take our event survey and let us know about your experience. We will provide a special discount to your next performance.

THANK YOU

Susan receives a thank you email... and survey
Susan posts to Facebook about her great experience

Oct. 2nd Saw Romeo and Juliet at The Lab Theatre
My first time at The Lab Theatre and what an evening! First rate production and the theatre is terrific. They even personally greeted me at my seat. Very impressed. I will be coming back and I urge all my friends to see Romeo and Juliet, and check out the theatre...you'll have an amazing time. - Susan
Lab Theatre runs a Facebook ad promoting to Susan’s friends
Susan’s Customer Journey
New Patron Acquisition

Google Search → Browse Shows → Known User

Create Account → Personalized Email → Receives Special Offer
Susan’s Customer Journey
First Purchase and Engagement

First Purchase → Receives Reminder SMS → Attends Welcome Tour

Free Drink SMS → Attends Event → Receives Thanks + Survey → Posts to Facebook
Susan makes a second purchase

**Susan Marshall**

**GENDER:** Female  
**ENTRY:** Search  
**INTERESTS:** Theatre and Fine Arts  
**PRODUCTS:** Dramas, Shakespeare  
**EMAIL:** smarshall@gmail.com  
**LOCATION:** Los Angeles, CA  
**JOURNEYS:** Welcome, 1st Purchase, 1st Visit, Feedback/Offer, Advocate, Engaged, Expand Network, 2nd Purchase  
**MOBILE:** Email

---

WELCOME BACK

Susan,

Welcome Back to The Lab Theatre! We are thrilled to see you return to the Theatre for our new production of *Twelfth Night*.

We urge you to get to the theatre early and view our special display on Shakespeare’s Comedies.

---

Confirming Your Purchase of Tickets to *Twelfth Night*...  
Susan Marshall, The Lab Theatre  
Tuesday, October 25, 2016 at 11:47 AM
Susan receives appeal to become a member at the Lab Theatre

Special Offer to Join the Lab Theatre's 2016-17 Season Today!

Susan, The Lab Theatre
Monday, October 31, 2016 at 1:22 PM

Members get more

The Value of Membership! You have seen some of the best Shakespeare productions in the city. And, now you have an opportunity to see even more at an even greater value.

Join us as a Member and get the best theatre at the best price in

Become a Lab Theatre Member today!
Susan becomes a Member and starts getting benefits that she cares about

Susan,

Congratulations! Your Membership has entitled you to early access to tickets for our Holiday production of Victor Hugo’s Les Miserables.

You are confirmed for your 4 tickets to the show on Sunday, December 25th at 3:00 PM. Also, please join us at 1:00 PM for a special membership Backstage Tour.

Members get more

Susan,

Congratulations! Your Membership has entitled you to early access to tickets for our Holiday production of Victor Hugo’s Les Miserables.

You are confirmed for your 4 tickets to the show on Sunday, December 25th at 3:00 PM. Also, please join us at 1:00 PM for a special membership Backstage Tour. Bring your family to get a first-hand look at one of the

Susan Marshall

GENDER: Female
ENTRY: Search
INTERESTS: Theatre and Fine Arts
PRODUCTS: Dramas, Shakespeare
EMAIL: smarshall@gmail.com
LOCATION: Los Angeles, CA
JOURNEYS: Welcome, 1st Purchase, 1st Visit, Feedback/Offer, Advocate, Engaged, Expand Network, 2nd Purchase, Membership
Dear Susan,

Our success could not be possible without you, our valued members and theatregoers. As we head into the new year, your

“"You are the Sentinels, Silent and Sure, Keeping Watch in the night...”"
Susan’s Customer Journey
Research, Retention & Relationship

Ad Targeted to Friends

Responds to Survey

Receives Targeted Offer

Repeat Purchaser

New Membership Appeal

Recurring Membership Discount Offer

Loyal Customer
Susan’s Customer Journey
Determine Resonance & Support Ask

Membership Offer / Benefit → Attends Members-only event → Customized Donor Appeal

Makes Donation → Major Donor Research → Cycle of Gifts, Thanks and Engagement → Evangelist

Major Donor Research

Cycle of Gifts, Thanks and Engagement

Evangelist

Customized Donor Appeal
Susan’s Customer Journey

New Patron → Known User → First Purchase → Repeat Patron → Evangelist
Let’s build your journey
Journey Map Ingredients (short)

Three Steps:
1. Create a Scenario
2. Create a Persona
3. Brainstorm the Journey
Create a Scenario

1. Who are we targeting?
2. Where are they starting?
3. Where will they end up?
### Create a Persona

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong> Ilona Dantzig</td>
<td><strong>Gender:</strong> Female</td>
<td><strong>Age:</strong> 28 years old</td>
<td><strong>Needs &amp; Goals:</strong></td>
</tr>
<tr>
<td><strong>Behaviors:</strong></td>
<td><strong>Marital Status:</strong> Married</td>
<td><strong>Living Situation:</strong></td>
<td><strong>Seeking a career opportunity.</strong></td>
</tr>
<tr>
<td>loves to plan</td>
<td><strong>Location:</strong> Arlington, VA</td>
<td><strong>Hobbies:</strong></td>
<td><strong>Desires:</strong> to grow.</td>
</tr>
<tr>
<td>very social</td>
<td><strong>Occupation:</strong> Intelligence Specialist</td>
<td></td>
<td><strong>Wants:</strong> a family.</td>
</tr>
<tr>
<td>businessman</td>
<td><strong>Education:</strong></td>
<td><strong>Skills:</strong></td>
<td><strong>Lives to charity.</strong></td>
</tr>
<tr>
<td>stressed to keep up with</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Create a Persona

1. Demographics
2. Behaviors
3. Needs
4. Goals
Susan’s Customer Journey
First Purchase and Engagement

First Purchase → Receives Reminder SMS → Attends Welcome Tour

Receives Reminder SMS → Free Drink SMS → Attends Event

Attends Event → Receives Thanks + Survey → Posts to Facebook
Brainstorm the Journey

1. Create steps between the beginning and the end
2. Each step should build on the prior step and stay focused on the next step.
3. Resist the urge to take steps that are too big
4. Don’t forget to add Random Acts and Asks
<table>
<thead>
<tr>
<th><strong>What They Do</strong></th>
<th><strong>What They Get</strong></th>
<th><strong>Random Act of Kindness</strong></th>
<th><strong>What You Ask For</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy a ticket for the first time</td>
<td>Tickets and a thank-you email</td>
<td>Invite to pre-show drink</td>
<td>Complete the post-show survey</td>
</tr>
<tr>
<td>Complete the Survey</td>
<td>Discount Code to Next Show</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buy a ticket using the Discount Code</td>
<td>Tickets and a thank you email</td>
<td>Visit them in their seat</td>
<td>Consider becoming a subscriber</td>
</tr>
</tbody>
</table>
Complete your survey!!!

Paul Miller | pmiller@patronmanager.com

www.patronmanager.com