

# From the first approach to the final purchase: **Optimizing the Customer Journey for SMEs and freelancers**



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## 1. Introduction

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Today, SMEs find themselves in a highly **competitive and constantly evolving** market, where **customer satisfaction plays a key role** in their success. To achieve a competitive advantage and build customer loyalty, it is **essential to understand their needs**, expectations and behaviors throughout their interaction with the company. For this reason, the Customer Journey is a **strategic tool, but also a management tool that allows you to visualize, analyze and improve the customer experience** at all stages of their relationship with the company. [REF-01]

The Customer Journey **represents the complete process that a customer** goes through from the first contact with the company to the post-sale. It encompasses all customer interactions and touch points with the brand, including website visits, customer service, and any other related experiences. Visualizing the Customer Journey allows you to understand how customers interact with the brand, what their needs and emotions are at that moment and what factors influence their decision making. Bain & Company, in a report, stated that **a 5% increase in customer retention can increase a company's profits by 25%**. By providing a consistent and satisfying experience at all stages of the Customer Journey, companies can strengthen customer loyalty and improve their long-term retention. [REF-02]



Understanding **customer needs and expectations**, along with identifying areas for improvement, are **key factors in strengthening customer relationships**. According to a report by PricewaterhouseCoopers (PwC), 73% of consumers consider experience to be a fundamental factor in their purchasing decisions. Such is the impact of customer experience in choosing a brand that, according to 42% of respondents, in the same study, they would be willing to pay more for a friendly experience. [REF-03]

Extending the Customer Journey is the **blueprint, also known as the experience map or service map**. It is a very useful tool as it visually details the different touch points and their impact on the internal processes (or vice versa) that a customer experiences during their Customer Journey.

Blueprints **expand and detail each stage of the process, showing the customer's specific interactions** with the company and the areas in charge at each touchpoint. By using blueprints, companies can identify potential gaps and opportunities for improvement in the customer experience, **enabling them to implement effective strategies to deliver a more satisfying and personalized experience at every stage of the customer journey**.

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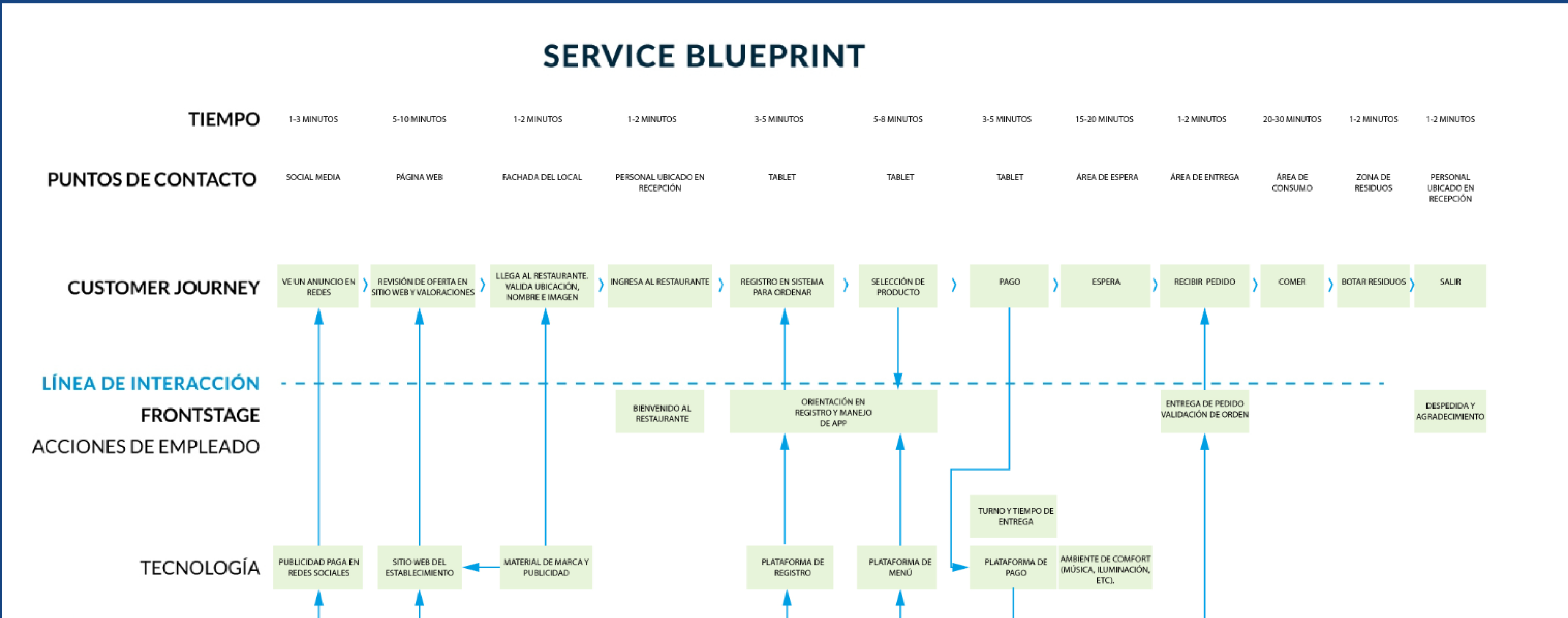
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Below is an example of a Service blueprint detailing each process that makes up the Customer Journey of the customer, in this case in a restaurant.



Source: Platzi.com

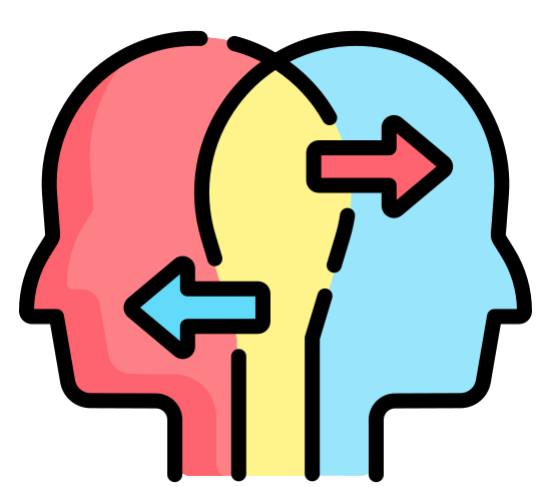
Throughout this monograph, we will explore in detail the importance of the Customer Journey, its components, how to implement it strategically and we will describe some tools that will facilitate its creation.



## 2. Customer Journey: breakdown and meaning

The Customer Journey is a process that **encompasses multiple stages** and touch points between a customer and a company. Understanding the key components of the Customer Journey is essential to identify opportunities for improvement and deliver a satisfactory customer experience [REF-04]:

- 1. Stages of the Customer Journey:** The Customer Journey can be divided into different stages that reflect the process a customer goes through from identifying a need to completing a purchase. Although each case may have its particularity, these stages, in general, can be classified as follows: Awareness, Research, Consideration, Decision and Post-sale.



**Awareness:** at this stage the customer becomes aware of a need and starts looking for options. During this phase, **marketing strategies play a crucial role** in capturing the customer's attention and presenting the brand as a relevant and attractive option. Having a presence on social media is an effective strategy to increase brand awareness.



**Research:** the customer searches for the different options that can satisfy his need. Here it is important to **provide the customer with useful** and transparent information so that the customer can see the product features, prices and reviews in a simple way.

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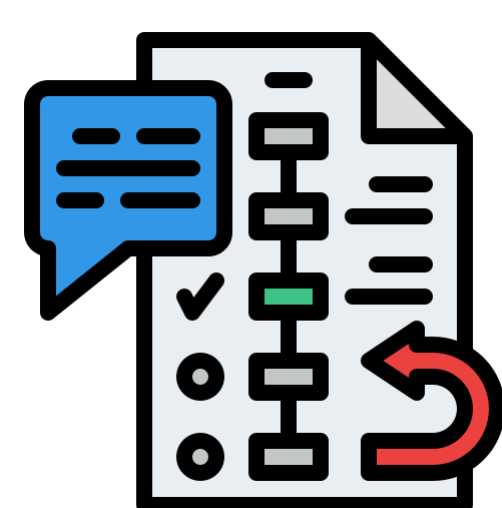




**Consideration:** this is when the customer evaluates the previously researched options and compares them to make a final decision. Offering **testimonials and success stories can positively influence the customer** and increase the chances of conversion. Personalization at this stage can provide a more relevant and compelling experience for the customer.



**Decision:** In the decision stage, the customer makes a final choice and purchases the selected product or service. **Facilitating the purchase process with an intuitive website and an easy checkout process** is critical to avoid abandonment at this stage. Efficient and fast customer service can make a difference in the customer's final perception of the brand and ensure a positive experience.



**After-sales:** The after-sales stage is important to maintain customer satisfaction and build customer loyalty. Follow-up after the purchase demonstrates the **company's commitment to customer satisfaction and allows to detect possible problems**. Offering exclusive promotions and loyalty programs helps to maintain customer interest in the brand and generate repeat purchases.

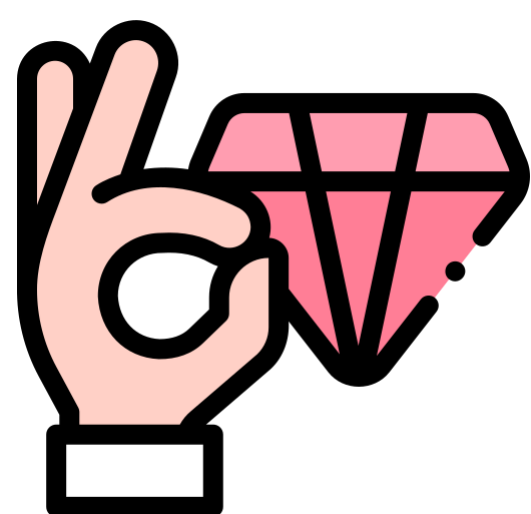
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In service companies, for example in insurance or maintenance, the concept of latency is relevant, in which on numerous occasions the customer does not receive any value from the company unless he expressly needs it. At this point it is important to offer valuable information, without saturating the customer, but so that the customer feels that the company cares and worries about him.

The stages are divided into moments, which are usually between 3 and 5 per stage. These moments (usually written in the first person, me as the customer), summarize the tasks or activities that the customer performs, and are the first basic 'unit of measurement' of a Customer Journey. There are different moments that are relevant:



**Moments of truth**: where the company cannot fail, because they are the most important moments in the relationship with the customer, and it is important to cover the basics and live up to the customer's expectations.



**Wow moments**: although there are different positioning currents among experts about them, these moments are prepared to surprise (positively) the customer, exceeding their expectations, build customer loyalty and also so that the customer can recommend the experience.

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- 2. Touchpoints:** Touchpoints are the **moments when the customer interacts with the company** throughout their Customer Journey. These touchpoints can be physical (such as a physical store), digital (such as a website or social media), or even phone or email interactions. Each touchpoint can influence the customer's perception of the company and affect their purchase decision.
- 3. Customer Emotions:** these play a crucial role in the Customer Journey. Each interaction with the company can generate different emotions in the customer, such as satisfaction, frustration, trust or distrust. **Understanding the emotions that customers experience at each stage of the journey is essential** to deliver a more positive and engaging experience. In the end, provoking positive customer emotions helps customer loyalty. Customers who have had positive experiences are more likely to return and become repeat customers, which helps an SME grow. Emotions also provide feedback for the company. If a customer experiences frustration or dissatisfaction at any point in their buying experience, this can help find areas that require improvement in the company. The ability to understand and address these emotions can lead to continuous improvement of the customer experience. **[REF-05]**

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## 3. Profiling the ideal customer: the power of customer archotyping

Customer archotyping is the **process of creating representations of different types of customers** based on common data and characteristics. Different methodologies can be used to determine the type of customer. Personal interviews with potential customers, surveys that are minimally representative and have a minimum participation of 300 people or focus groups can be used. With these methodologies it will be possible to know the interests of the different potential customers. **This technique is valuable for the design of the Customer Journey for the following reasons: [REF-06].**



**Customer Segmentation:** Archotyping allows companies to group their **customers into different segments with similar characteristics and needs and behaviors**. It **complements traditional segmentation based on statistical data (age, gender, province, etc.)**, and facilitates the personalization of the customer experience for each segment, increasing relevance and satisfaction.

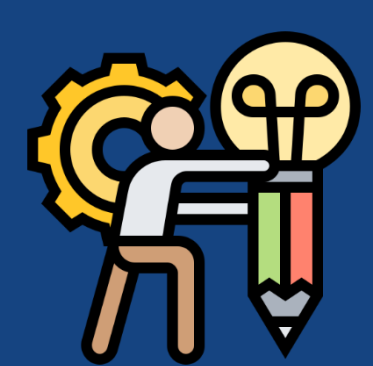


**Message personalization:** By understanding the needs, preferences and behaviors of each customer archetype, companies can **tailor their marketing and communication messages** to connect more effectively with each archetype. Personalization increases the likelihood that the customer will respond positively to the offer.





**Customer Journey Optimization:** Customer archotyping provides valuable insights into how different segments interact with the company throughout the Customer Journey. This enables the identification of specific pain points and improvement opportunities for each archetype, leading to more effective Customer Journey optimization.



**Creating Relevant Experiences:** By designing specific experiences for each customer archetype, companies can ensure that the **offering is relevant and engaging for each segment**. This increases the likelihood that customers will be satisfied and loyal to the brand.

El Customer archotyping plays a critical role in **designing a personalized and relevant experience for each customer segment**, which increases the likelihood of success and long-term loyalty. By focusing on these aspects, companies can gain a competitive advantage and stand out in an increasingly competitive and customer-centric marketplace.

Even though each customer is different, there are some prototypes of customers in the digital sphere that are important to know in order to adapt the Customer Journey to each of them.

[REF-07]



## 1.

**The one who wants it all done:** This customer is looking for a hassle-free experience and **prefers the company to provide complete and ready-to-use solutions**. They value convenience and simplicity in the buying process, which requires a user-friendly interface and efficient customer service to meet their needs quickly and effectively.

## 2.

**The highly analytical:** This type of customer is thorough and takes time to research and compare different options before making a decision. They value detailed information, so it is **important to provide them with relevant and transparent content** at every stage of the Customer Journey to help them make an informed decision.

## 3.

**The very conservative:** The conservative customer prefers known and proven brands and products, and shows resistance to change. It is essential to gain their trust and **demonstrate the value of the products or services offered through testimonials, guarantees and references** to ensure their loyalty and satisfaction over time.

## 4.

**The impulsive:** This customer is driven by flashy offers and emotional purchases. They tend to **respond quickly to promotions and discounts on social networks** or websites, which requires strategies to capture their attention at the awareness stage.



## 4. The Customer Journey as a driver of success in SMEs

Designing a good Customer Journey **provides multiple benefits** to improve customer satisfaction and business performance **[REF-08]**:

- **Understanding the customer:** The Customer Journey enables SMEs to better understand users' motivations, needs and preferences. By gaining an in-depth understanding of customer needs, the **SME can tailor its products** and services to meet their demands more effectively.
- **Identify opportunities:** Analyzing the Customer Journey gives the opportunity to detect pain points in the customer experience. Identifying areas for improvement **allows you to implement changes and optimize the interaction**, which can lead to increased customer retention and conversion rate.
- **Customer loyalty:** By providing a positive and consistent experience across all interactions, **SMEs can build customer loyalty. Satisfied customers** are more likely to make repeat purchases and recommend the brand to others, contributing to the long-term growth and success of the company.

Those companies that focus on customer satisfaction and provide a satisfying experience will stand out more and better in an increasingly competitive market.



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## 5. A guide to an outstanding customer experience

This step-by-step guide offers SMEs a solid strategy to improve the Customer Journey and optimize the customer experience: [REF-09].

**1. Research and analyze:** Start by identifying the key stages of the Customer Journey in the SME. It is important to research and **collect data on how customers interact with the company at each point of contact**, both qualitatively (interviews, mystery shopping, focus groups) and quantitatively (mostly through surveys).

**2. Define customer archetypes:** As stated above it is very important to **create customer archetypes** based on the research conducted. Customers with similar characteristics should be grouped together to better understand their motivations and behaviors.

**3. Establish objectives:** It is of utmost importance to define clear objectives to improve the SME's Customer Journey. These **objectives must be measurable and specific**. For example, improve the conversion rate, increase customer satisfaction in the post-sales stage or decrease the abandonment rate.

**4. Design a consistent experience:** Use customer archetypes and analytics data to design, a consistent, personalized experience at each stage of the journey.

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5.

**Implement improvements at each stage:** Focus efforts on addressing identified friction points and **leveraging opportunities for improvement** in the Customer Journey. Changes to the website, internal processes or customer service can be implemented to achieve a more satisfying experience.

6.

**Monitor and measure:** It is essential to establish metrics to measure the success of the improvements implemented in the Customer Journey. **Tools can be used to measure performance and customer satisfaction** at each stage. Monitoring should be carried out on a regular basis and strategies should be adjusted according to the results obtained.

7.

**Obtain feedback:** It is necessary to solicit customer feedback on a regular basis by sending out satisfaction surveys or collecting comments through digital media. This information is important to **continue improving and adapting the Customer Journey according to the changing needs of customers**. When dissatisfied customers arise, it is positive to take actions to compensate for any potential issues the customer may have. For example, offer a discount on their next purchase. In this way, customer loyalty is achieved. Voice of Customer (VoC) programs help to systematize this process efficiently.



## 6. Designing the customer journey: Essential tools

There are several tools that an SME can use to **design and improve its Customer Journey without incurring a large cost**. These tools provide effective solutions to map, analyze and optimize the customer journey more efficiently. Here are some options:

- **Customer Journey Mapping Tools:** Platforms such as **Canva [REF-10]**, can help create Customer Journey maps to help understand and improve the customer experience. **Miro [REF-11]** is another tool that allows you to create detailed Customer Journey maps in a collaborative way. These free tools allow you to represent the different stages and points of customer contact with the company, facilitating the identification of opportunities for improvement.



- **Online surveys and forms:** Using tools such as **Google Forms [REF-12]**, **SurveyMonkey [REF-13]** or **Typeform [REF-14]**, allows an SME to **collect data and opinions from customers at each stage** of the Customer Journey by designing customized surveys. These can be very useful to obtain feedback from customers in order to improve the customer experience.



Google Forms



Typeform

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- **Web Analytics Platforms:** Tools such as **Google Analytics**, [REF-15] provide **valuable data on how customers interact with the company's website**. By knowing the most visited pages and dwell time, it is possible to identify critical points and measure the performance of the Customer Journey when accessing the SME's website. This tool is also free of charge.



- **Chatbots and Virtual Assistants:** Integrating a chatbot into the website or social media platforms **gives SMEs the ability to provide instant assistance to customers**. There are low-cost chatbot options, such as Tidio [REF-16], which is easy to implement and allows for fast and personalized customer service. This tool **costs 15 euros per month**.

- **Social Networks and Communication Platforms:** Using social networks such as Facebook, Twitter or LinkedIn, as well as instant messaging platforms such as WhatsApp, facilitates interaction with customers. Thanks to them, you can **answer customer queries, offer support and share relevant content**, strengthening the bond with customers at different stages of the Customer Journey.



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- **Marketing automation:** Marketing automation platforms such as MailChimp [REF-17] offer free plans **to send personalized emails based on customer behavior and preferences.** Automation helps the SMB maintain consistent and relevant communication throughout the Customer Journey.



**mailchimp**

By using these low-cost tools, an SMB can design, implement and enhance its Customer Journey without exceeding its budget. The key is to understand specific customer needs, use data to make informed decisions and leverage available technology to deliver an exceptional customer experience at every stage of the journey.

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## 7. Conclusions

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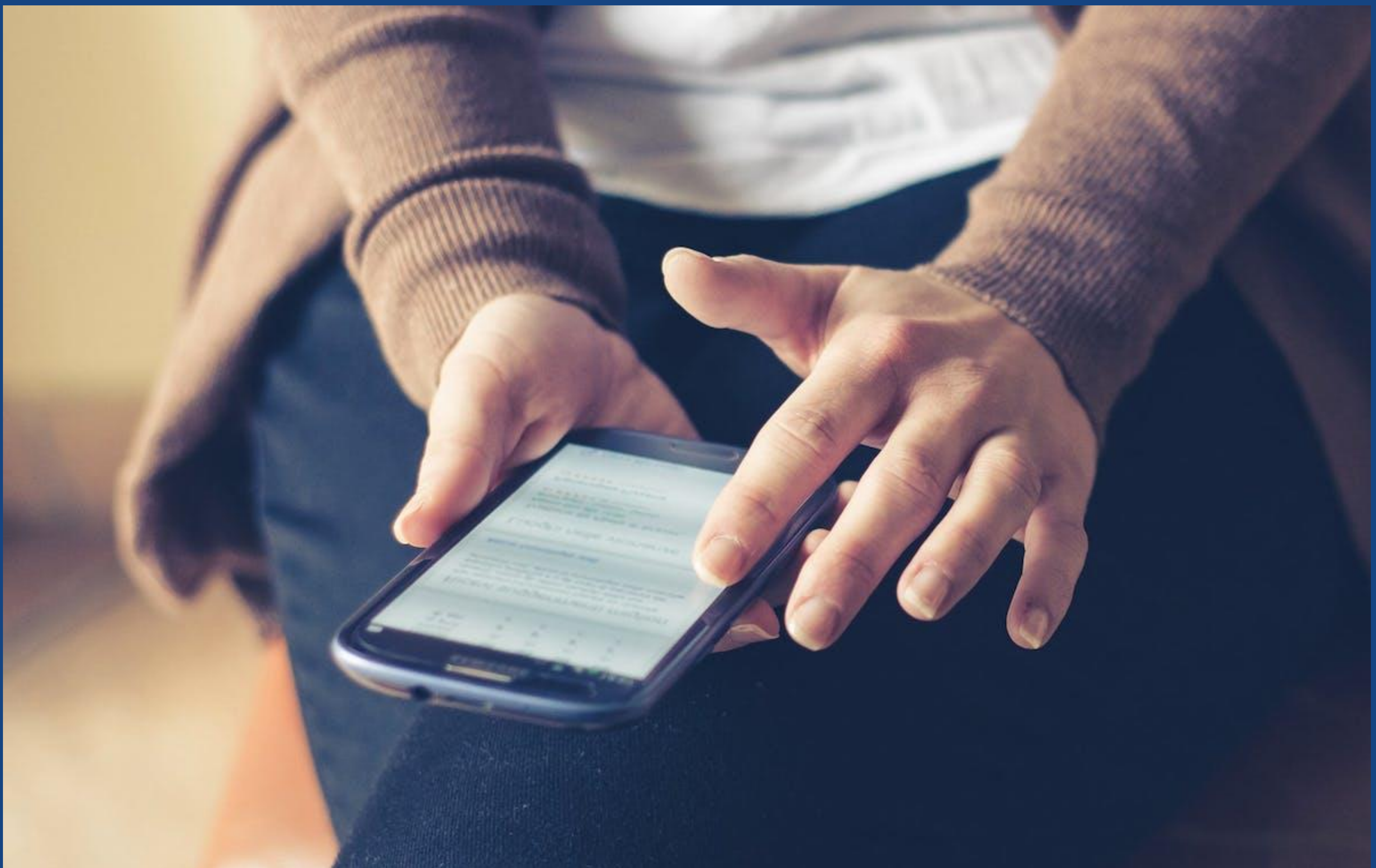
In conclusion, the **Customer Journey** is an **essential tool** for SMEs today, as it enables them to **understand and optimize the customer experience** throughout the customer journey with the company. By focusing on customers' needs and expectations at every stage, SMEs can deliver a more satisfying, personalized and relevant experience, leading to a number of significant benefits.

First, improving the **Customer Journey** can lead to **increased customer satisfaction**. By providing a more personalized experience, greater customer loyalty is achieved. Second, by analyzing the Customer Journey, SMEs can **identify areas of opportunity and pain points in the buying process**. This allows them to make strategic adjustments and optimize internal operations to provide a more efficient and convenient customer experience. In addition, the Customer Journey is a **valuable tool for segmentation and personalization of marketing strategies**.

Understanding how different customer segments interact with the brand at each stage allows you to tailor messages and offers to meet their specific needs, increasing the relevance and effectiveness of marketing campaigns.



In short, the Customer Journey should be a **strategic tool for any SME or freelancer** offering their services or products on the Internet, as it allows them to **understand, design and improve the customer experience** at all stages of the journey, and consequently obtain greater profitability for their business.



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