

Map out your desired customer journey

Map out your key businesses processes (annual compliance, invoicing & collections, periodic processing, etc.) from start to finish making note of all the different touch points for your clients, and the tools / communication methods involved. How do you want your clients to experience the process? Is everyone doing the same thing and using the same tools/technology? What gaps need to be closed, or questions answered, to allow for synergy between your internal processes and your client journey? What friction points exist on the customer journey that could be adding to processing delays, errors, or dissatisfaction?

Create your own customer journey using the template below

	Step one	Step two	Step three	Step four
Persona				
Customer Experience				
Touchpoints				
Thinking & feeling				