

Purpose Built Automations - Customer Journey Mapping Worksheet

Company Name: _____

Contact Name: _____

Email: _____

Phone: _____

Please provide a brief description of your business:

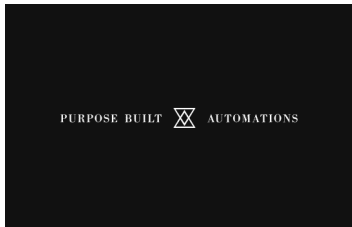
1. Target Audience

Describe your primary target audience (age, gender, location, interests, needs, etc.):

2. Customer Touchpoints

List all the touchpoints where your customers interact with your business (e.g., website, social media, email, phone, in-person, etc.):

1. _____
2. _____
3. _____
4. _____
5. _____



3. Customer Journey Stages & KPIs

Describe the main stages a customer goes through when interacting with your business. For each stage, identify the actions customers take, the touchpoints involved, any pain points or opportunities for improvement, and relevant KPIs to track:

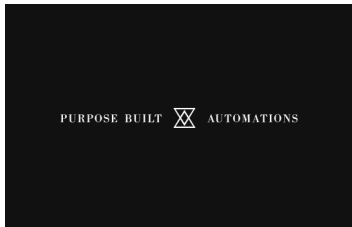
A. Awareness:
Actions: _____
Touchpoints: _____
Pain Points/Opportunities: _____
KPIs: _____

B. Consideration:
Actions: _____
Touchpoints: _____
Pain Points/Opportunities: _____
KPIs: _____

C. Purchase:
Actions: _____
Touchpoints: _____
Pain Points/Opportunities: _____
KPIs: _____

D. Retention:
Actions: _____
Touchpoints: _____
Pain Points/Opportunities: _____
KPIs: _____

E. Advocacy:
Actions: _____
Touchpoints: _____
Pain Points/Opportunities: _____
KPIs: _____



4. Internal Employee Processes & KPIs

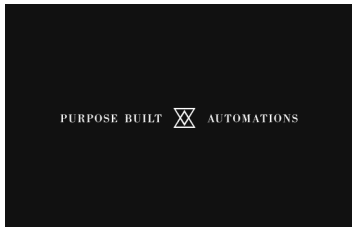
Describe the main internal processes your employees follow to support the customer journey (e.g., lead generation, sales, customer service, etc.). For each process, identify relevant KPIs to track:

- 1. _____ : _____
KPIs: _____
- 2. _____ : _____
KPIs: _____
- 3. _____ : _____
KPIs: _____
- 4. _____ : _____
KPIs: _____
- 5. _____ : _____
KPIs: _____

5. Reports

List the reports you would like to see generated from the automation system:

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____



6. Implementation and Maintenance Participants

Please provide information about who will participate in the implementation and maintenance of the automation system. Include key roles and the number of employees involved:

Key Roles:

- 1. _____
- 2. _____
- 3. _____

Number of Employees Involved: _____

7. Additional Notes

Please provide any additional information that you think would be helpful for us to design the best automation solutions for your business:

Once you have completed this worksheet, please email to sales@purposebuiltautomations.com or send a link to a file share. We will review the information and get in touch with you to discuss the next steps.