Customer Buying Journey Mapping

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Your business already has an operating system. It's just invisible, living in your head and your team's assumptions. When the buying journey isn't mapped, leads go cold because follow-up relies on memory, handoffs break because ownership isn't clear, delivery feels chaotic because expectations weren't defined at sale, and growth stalls because you become the default "glue."

The goal of this guide is to create a visible map from prospect → customer → value delivered → long-term partner, then align it to your CRM so your pipeline becomes a source of truth.

Step 1: Pick one journey to map

Don't map everything. Pick the part that creates the most pain.

Choose one:

- Sales journey (lead → closed deal)
- Day 1 delivery journey (signed → first win/value delivered)
- Renewal/expansion journey (customer → repeat buyer)

Write yours here:

The journey I'm mapping today is: ____________________

Step 2: Map the journey in micro-steps

Grab a whiteboard or paper. Write the trigger step first.

What kicks this off? (e.g., inbound enquiry, referral intro, lead magnet opt-in)
Trigger: ____________________

Then keep asking "and then what?" until a stranger could follow it.

Use this structure:

1. Trigger: ____________________
2. Step (who owns it?): ____________________
3. Step (who owns it?): ____________________
4. Step (who owns it?): ____________________
5. Step (who owns it?): ____________________
6. Step (who owns it?): ____________________
7. Outcome (what "done" looks like): ____________________

Rule: if a step relies on someone remembering, it's not a step, it's a risk.

Step 3: Find the bottlenecks (the gaps between steps)

Now look at the space between each step. For every handoff, answer:

- What gets handed over? (info, doc, task, payment, decision)
- Where does it live? (email, Slack, CRM, folder)
- Who owns the next step? (one named person/role)
- What's the deadline? (same day, 48h, 1 week)

Circle any handoff where:

- Nobody owns it clearly
- Work waits because someone is "busy"
- You have to step in to move it forward
- The client has to chase you
- The next step isn't triggered automatically

Write your top 3 bottlenecks:

1. ____
2. ____
3. ____

Step 4: Map the buyer's journey stages (CRM alignment)

Your CRM should mirror the buyer's journey, not your internal tasks.

Core buyer stages you can use as a base:

- New Lead (they raised a hand)
- Qualified (right fit + urgency)
- Discovery Booked
- Discovery Completed
- Proposal / Plan Sent
- Decision Pending
- Closed Won / Closed Lost
- Onboarding / Kickoff
- Value Delivered (First Win)
- Ongoing Delivery
- Renewal / Expansion

Now customise to your business (keep it simple):

My CRM stages are:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________

Step 5: Define exit criteria for every stage

This is the difference between a pipeline and a list of vibes.

For each stage, define what must be true for this to move forward.

- Example: Qualified → Discovery Booked
- Exit criteria: decision-maker confirmed + problem clear + timeline defined

Fill this in for your top stages:

Stage: __________ | Exit criteria: ____________________
Stage: __________ | Exit criteria: ____________________
Stage: __________ | Exit criteria: ____________________
Stage: __________ | Exit criteria: ____________________
Stage: __________ | Exit criteria: ____________________

Step 6: Install a handoff rule

Pick one rule and enforce it.

Rule A: Single owner

Every stage has one owner, not "the team."

Rule B: Next-step required

No deal sits without a next action and date.

Rule C: Same-day follow-up

Every enquiry gets a response the same day, even if it's just a triage message.

From today, our pipeline rule is: ____________________