



MINDSHARE
COLLABORATIVE

CUSTOMER JOURNEY WORKSHOP WORKBOOK



Welcome

Traditional online marketing strategies and tactics don't always recognize the unique thoughts, emotions, and actions health and wellness consumers experience when looking for solutions. The most successful health businesses start with a clear understanding of their customer's journey and script the perfect experience. This workshop is designed to help you create a well-defined roadmap to identify what your prospects feel, think, and do before they consider buying from you, and the appropriate marketing assets to build trust and earn clients.

Workshop Objectives

After completing this workshop you should be able to:

1. Identify your prospects emotions, thoughts and actions
2. Quickly develop trust with your prospects
3. Learn how to effectively communicate with prospects in each stage with credibility
4. Create messaging that positions you favorably for your ideal client
5. Identify ways to remove barriers to purchase and eliminate abandoned carts
6. Create systems to justify clients' purchases and reduce refunds
7. Increase client referrals.

Student Roadmap

1. Participate in all sessions throughout the workshop
2. Download worksheets and checklists as instructed
3. Contribute during break out sessions
4. Complete Your Brand worksheet
5. Complete Avatar worksheet
6. Complete Customer Journey Worksheets
7. Fill in the Customer Journey Examples worksheet
8. Complete Pain/Gain/Fear/Want/Need Worksheet
9. Answer the Insights and Action Steps in this document



Your Business Recap

About You

Your Expert Title

Nutrition and Fitness Expert

Your Niche

Food and carb intolerance related to weight loss resistance

Your Ideal Client

Who They Are

40 year old woman, feels like her body is betraying her, what used to "work" for weight loss is making her feel worse, tired, bitchy, achey, searching for answers

Problem You Solve

Someone unable to lose weight despite "eating healthy"..... I help you uncover your hidden food intolerances so you can finally lose the weight and feel better fast

Your Product

How You Solve It

Book, online program plus products that eliminate swap 7 bad foods with healing foods, & rechallenge them

Transformation / Results

Lose 7 pounds in 7 days & continue to lose and keep it off, breakfree of NLR and weight regain



About You

Your Expert Title

Your Niche

Your Ideal Client

Who They Are

Problem You Solve

Your Product

How You Solve It

Transformation / Results





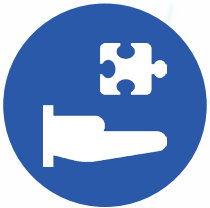
Pre-Aware

I don't know what the problem / opportunity is



Problem Aware

I know what the problem is, but unclear how to solve it



Solution Aware

I know different ways to solve the problem



Brand Aware

I know who provides the solution I want



Buying

I've decided and am ready to purchase



Post Purchase

I've made my purchase, now what?



Advocacy

I'm going to share my experience (good or bad)

Content Marketing

E-Book / Kindle / iBook Book
Blog Post
Syndicated Article
Case Study / White Paper
Webinar / Workshop
Testimonial
Direct Mail
E-Newsletter
Cookbook / Recipes
Checklist
Assessment / Quiz

Social Engagement

Facebook Post, Live, TV, Group
Instagram Post, Story, Live, TV,
Highlights
YouTube Live / Video / Community
LinkedIn Post / Video
Podcast Interview / Show
Twitch
Twitter
TikTok
SnapChat
Pinterest

Paid / Earned Media

TV Interview
Radio Interview
Newspaper Interview
Magazine Article
LinkedIn Ad
YouTube Ad
Print Ad
Native / Solo Email
Display Ad
Affiliate Offer
Directory Listing

Product / Sale

Video Sales Page
Long Form Sales Letter
Upsell / Downsell
Free / Paid Mini Course
Discount Coupon / Offer
Free Trial
Discovery Call
Printed Book
Masterclass
BOGO
Loyalty Program





Step 1: Pre-Aware

“I don’t know what the problem / opportunity is”



Step 1: Pre-Aware

When a prospect takes the **Pre-Aware** Step, they are perceiving a need ...
something's not right, not sure what. They have a goal, not sure why they're not
hitting it. They feel unsettled.

**How is your prospect encountering the world around them before becoming aware of their core problem? They may have a symptom, but they're not aware of the cause. They may have a goal, but have no idea how to achieve it.*

They are in this step if:

they don't have a clear understanding of
the cause of their problem or opportunity;
are unclear about options to solve their
problem or realize their opportunity



Stay in this step until they are clear about the nature of the problem or
opportunity (problem aware).





Feelings during the **Pre-Aware** Step can include:

Feeling

- > Pain
- > Anxiety
- > Curiosity
- > Unsettled
- > Excited
- > _____

Want them to feel

- > Curious
- > Aware
- > Educated
- > Heard / Felt / Understood
- > Welcome
- > _____

What are your prospects feeling during the **Pre-Aware** Step?
(write any that may apply)

Feeling

Want them to feel

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Thoughts during the **Pre-Aware** Step can include:

Thinking

- > What's causing this?
- > Should I address this?
- > I wonder if?
- > Can I?
- > Why?
- > How?

Want them to think

- > I found a great resource
- > I just discovered a gem
- > I like this author / expert
- > I could do this
- > Oh, that's why
- > So this is how

What are your prospects thinking right now, during the **Pre-Aware** step?
(write any that may apply)

Thinking

Want them to think

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Activities during the **Pre-Aware** Step can include:

Doing

- > Google search
- > YouTube search
- > Amazon search
- > Ask / Share in conversations
- > Engaging their Reticular Activation System

Want them to do

- > Discover my content
- > Discover my community
- > Opt-in
- > Download resource
- > Engage with my brand
- > _____

What activities are your ideal prospect engaging in during the **Pre-Aware** Step? (write any that may apply)

Doing

Want them to do

<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

↑ Rank from Most Likely (1) to Least Likely (10)





Marketing Assets & Messages

Asset types appropriate for the **Pre-Aware** Step include:

Assets

- > E-Book, Printed Book
- > White Paper
- > Quiz / Assessment
- > Blog Post
- > YouTube Videos
- > IG / FB Live

Messages

- > Trying to [find / research] -
you've come to the right place!
- Practical. Factual. Trust
- Worthy. Aspirational.
- NOT Salesy. "Here's how to..."
- "Here's what..." Here's why..."

List the assets and messages you feel will most likely move your prospect from **Pre-Aware** to **Problem Aware**.

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Rank from Most Likely (1) to Least Likely (10)





FROM

TO

Feel

Think

Do

Primary Message

Assets





Step 2: Problem Aware

“I know what the problem is, but I don’t know how to solve it”

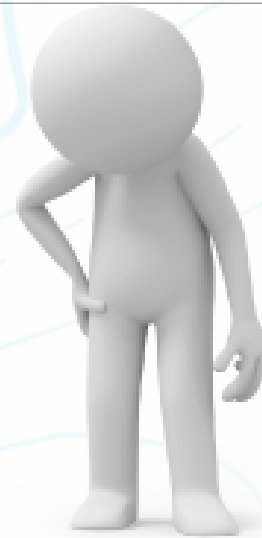


Step 2: Problem Aware

When a prospect takes the **Problem Aware** Step, they are clear what the opportunity is. Now, they are looking for what options exist to solve the problem or seize the opportunity. Primary tools of discovery are search related, and include a) Internal search (Do I want this / need this) ,or b) External Search (friends / family, search (google, etc), Marketer Generated Content Marketing.

They are in this step if:

they are aware of the difference between their IDEAL situation, and their ACTUAL situation - searching for how to close the gap.



Stay in this step until they've decided HOW to accomplish their goal or solve their problem, and begin evaluating which provider to choose.





Feelings during the **Problem Aware** Step can include:

Feeling

- > Confused
- > Overwhelmed
- > Fearful
- > "I'm Different"
- > Optimistic
- > Determined

Want them to feel

- > Clear
- > Relieved
- > Confident
- > This is for me
- > Knowledgeable
- > I want this

What are your prospects feeling during the **Problem Aware** Step?
(write any that may apply)

Feeling

Want them to feel

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Thoughts during the **Problem Aware** Step can include:

Thinking

- > How do I fix it?
- > Where do I start?
- > Who can I trust?
- > What does this mean?
- > Any other choices?
- > Which is BEST, Fastest, Cheapest

Want them to think

- > I understand how why
- > This is "me"
- > I found the choice for "Me"
- > This is "why" this is for "Me"
- > This is the best VALUE for me
- > I know what options exist

What are your prospects thinking right now, during the **Problem Aware** step?
(write any that may apply)

Thinking

Want them to think

<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

↑ Rank from Most Likely (1) to Least Likely (10)





Activities during the **Problem Aware** Step can include:

Doing

- > Google search
- > YouTube search
- > Amazon search
- > Read books, articles, mags
- > Asking family / friends
- > Discovering groups

Want them to do

- > Engage (watch, read, join)
- > Take assessment, quiz
- > Identify "where they are"
- > Get answers from you (trust)
- > Commit to solving the problem
- > Speak with you (phone, webinar)

What activities are your ideal prospect engaging in during the **Problem Aware** Step? (write any that may apply)

Doing

Want them to do

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Marketing Assets & Messages

Asset types appropriate for the **Problem Aware** Step include:

Assets

- > EBook, Book, Mini-course
- > White Paper
- > Quiz / Assessment
- > Blog post, Earned media
- > YouTube videos / IG Live
- > Groups

Messages

- > There are several ways to solve your problem, here's the difference between each, and how to find the one right for you.
- [Brand] has earned the trust of people like you.

List the assets and messages you feel will most likely move your prospect from **Problem Aware** to **Solution Aware**.

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Rank from Most Likely (1) to Least Likely (10)





FROM

TO

Feel

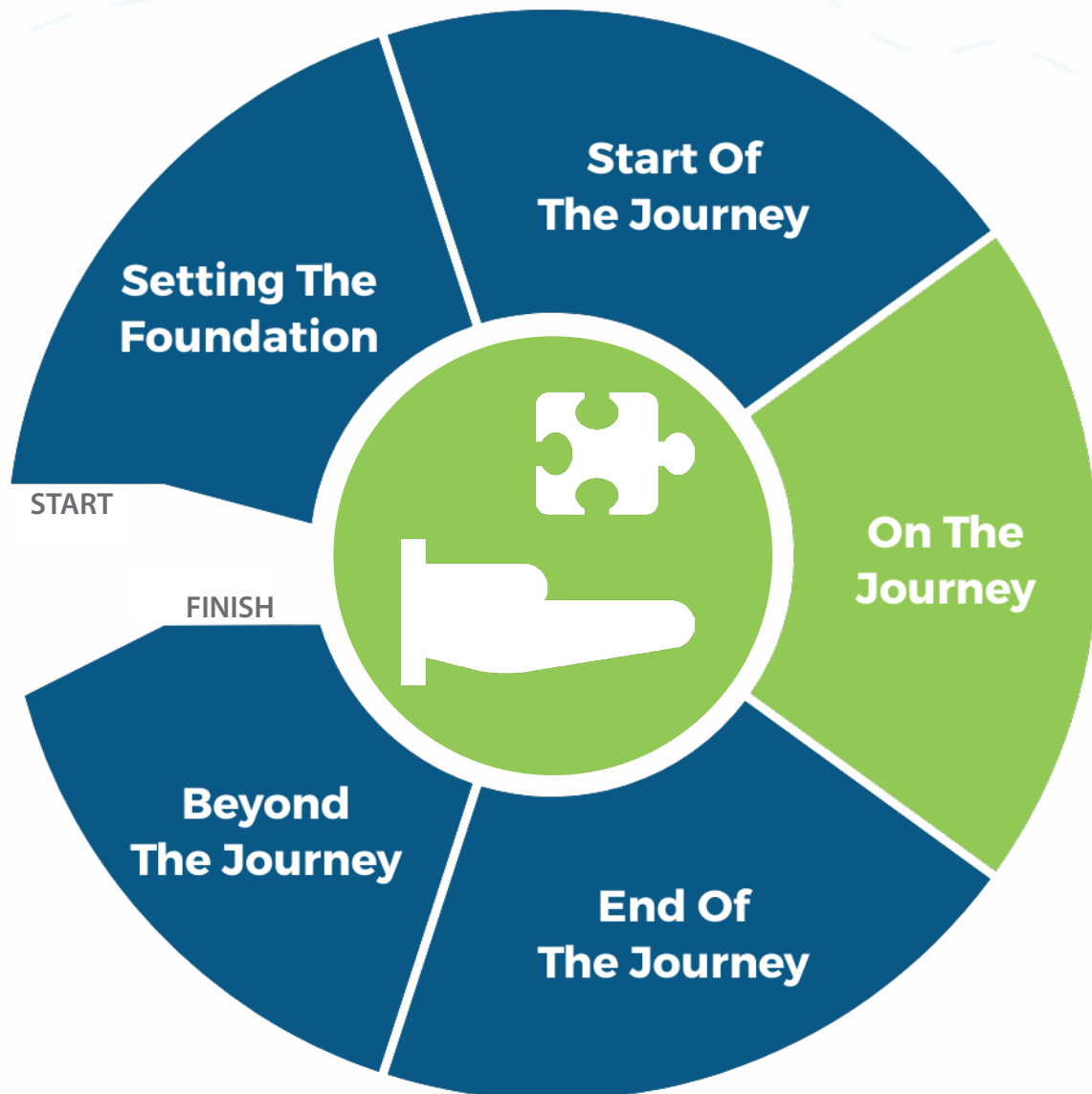
Think

Do

Primary Message

Assets





Step 3: Solution Aware

“I know different ways to solve the problem, but I don’t know who”

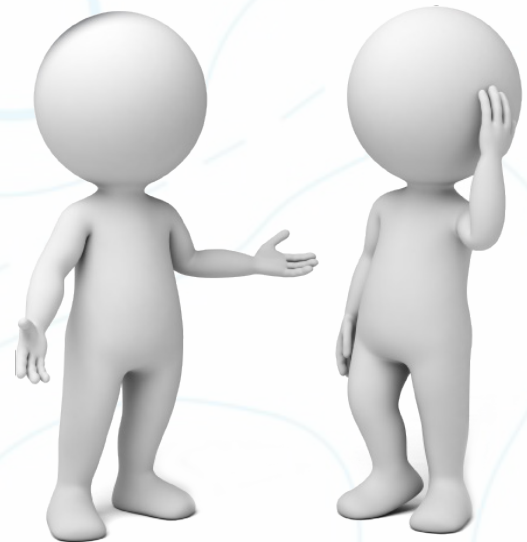


Step 3: Solution Aware

When a prospect takes the **Solution Aware** Step, they are aware of their problem / opportunity. Now, they are evaluating solutions, eliminating choices (elimination is the key criteria for most). The amount of research is based on the complexity of the problem. Complex / important problem solving (high research); Limited problem solving (medium research); Routine problem solving (low research / evaluation).

They are in this step if:

they know the problem, potential solutions, but have not yet selected the final brands for consideration.



Stay in this step until they are evaluating vendors / providers or solve the problem on their own. Your goal: you have a unique solution that solves the problem.





Feelings during the **Solution Aware** Step can include:

Feeling

- > Hopeful, Encouraged
- > Indecisive
- > Skeptical
- > Optimistic
- > Fearful
- > "I'm Different"

Want them to feel

- > Decisive
- > Relieved
- > Excited, Optimistic
- > Safe, Trusting
- > Known - this is for them
- > Ready to take action

What are your prospects feeling during the **Solution Aware** Step?
(write any that may apply)

Feeling

Want them to feel

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Thoughts during the **Solution Aware** Step can include:

Thinking

- > Which solution is better ?
- > What's the relative risk?
- > Which is the best?
- > Which can I afford?
- > Is there anything else?
- > Who can help me decide

Want them to think

- > I trust this solution
- > This is the best solution for me
- > This is the safe choice, low risk
- > This is cutting edge
- > This is the best value
- > I'm ready! Let's do this!

What are your prospects thinking right now, during the **Solution Aware** Step?
(write any that may apply)

Thinking

Want them to think

<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Rank from Most Likely (1) to Least Likely (10)





Activities during the **Solution Aware** Step can include:

Doing

- > Search Google, YouTube
- > Read books
- > Share with family
Ask friends
- > Read reviews / Ratings
- > Call vendors, Ask questions

Want them to do

- > Pick your solution(s)
- > Eliminate competitive options
- > Speak with your team
- > Purchase sooner than later
- > _____
- > _____

What activities are your ideal prospect engaging in during the **Solution Aware** Step? (write any that may apply)

Doing

Want them to do

<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Rank from Most Likely (1) to Least Likely (10)





Marketing Assets & Messages

Asset types appropriate for the **Solution Aware** Step include:

Assets

- > E-Book
- > White Paper
- > Quiz / Assessment
- > Blog Post
- > Reviews / Comparisons
- > _____

Messages

- > When considering [option], make sure the option you select:
[list of favorable features / benefits / differentiators]. The
[option] is the safe choice for [audience type] when...
- > _____
- > Here's how to select the right [option] for you, if you're
[avatar attributes] and looking for [value driver]
- > _____

List the assets and messages you feel will most likely move your prospect from **Solution Aware** to **Brand Aware**.

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Rank from Most Likely (1) to Least Likely (10)





FROM

TO

Feel

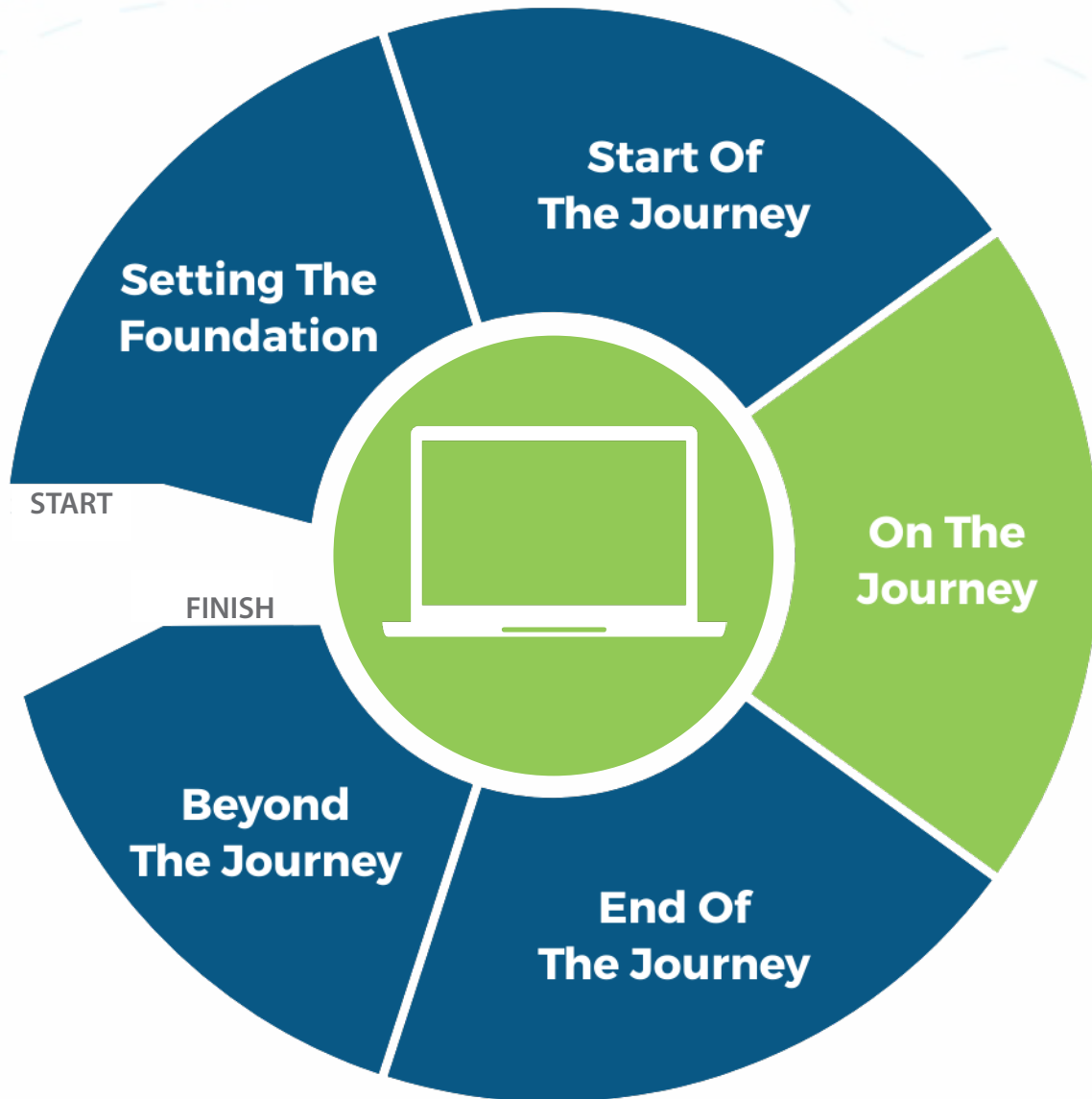
Think

Do

Primary Message

Assets





Step 4: Brand Aware

“I know who can provide the solution I want, I just need to pick someone”



Step 4: Brand Aware

When a prospect takes the **Brand Aware** Step, they are searching for the
provider / vendor / business who can deliver their chosen solution with
the greatest value to them (based on their criteria).

They are in this step if:

they are clear on the solution they want,
and have not yet selected a vendor, or are
not committed to solving the problem yet.



Stay in this step until they are ready to purchase.





Feelings during the **Brand Aware** Step can include:

Feeling

- > Encouraged, ready to buy
- > Skeptical, Distrusting
- > Optimistic
- > Smarter
- > Overwhelmed
- > Decisive

Want them to feel

- > Safe / little to no risk
- > Connected to your brand
- > Trusting
- > Excited about the future / outcome
- > Clear / Focused / Eager
- > _____

What are your prospects feeling during the **Brand Aware** Step?
(write any that may apply)

Feeling

Want them to feel

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Thoughts during the **Brand Aware** Step can include:

Thinking

- > Who's the best? Why?
- > Who do most people use?
- > Why this brand over the other ?
- > Where's the hidden Gem?
- > How do I get a Deal?
- > When's the best time to buy?

Want them to think

- > This is the best choice for me
- > Your brand stands apart
- > They like you as a provider
- > This is the safest choice
- > They discovered a rare find
- > NOW is the best time to buy

What are your prospects thinking right now, during the **Brand Aware** step?
(write any that may apply)

Thinking

Want them to think

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Activities during the **Brand Aware** Step can include:

Doing

- > Search for ratings / reviews
- > Compare offers
- > Search YouTube for vendor
- > Reviews, videos of provider
- > Ask friends and family
- > Evaluate history, distance

Want them to do

- > Eliminate competitors from consideration
- > Choose your brand
- > Purchase
- > _____
- > _____

What activities are your ideal prospect engaging in during the **Brand Aware** Step? (write any that may apply)

Doing

Want them to do

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

↖ Rank from Most Likely (1) to Least Likely (10)





Marketing Assets & Messages

Asset types appropriate for the **Brand Aware** Step include:

Assets

- > Books, Articles, White Papers
- > Before purchase checklist
- > Case history, Testimonials
- > Featured articles / Press
- > Discount coupons / Bonuses
- > Bundled offer

Messages

- > Hi, I'm [name] and I'd love to help you achieve [the outcome] they want for [problem]. Here's my commitment to you... (goal is to reverse risk, create urgency, make purchase)

List the assets and messages you feel will most likely move your prospect from **Brand Aware** to **Buying**.

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Rank from Most Likely (1) to Least Likely (10)





FROM

TO

Feel

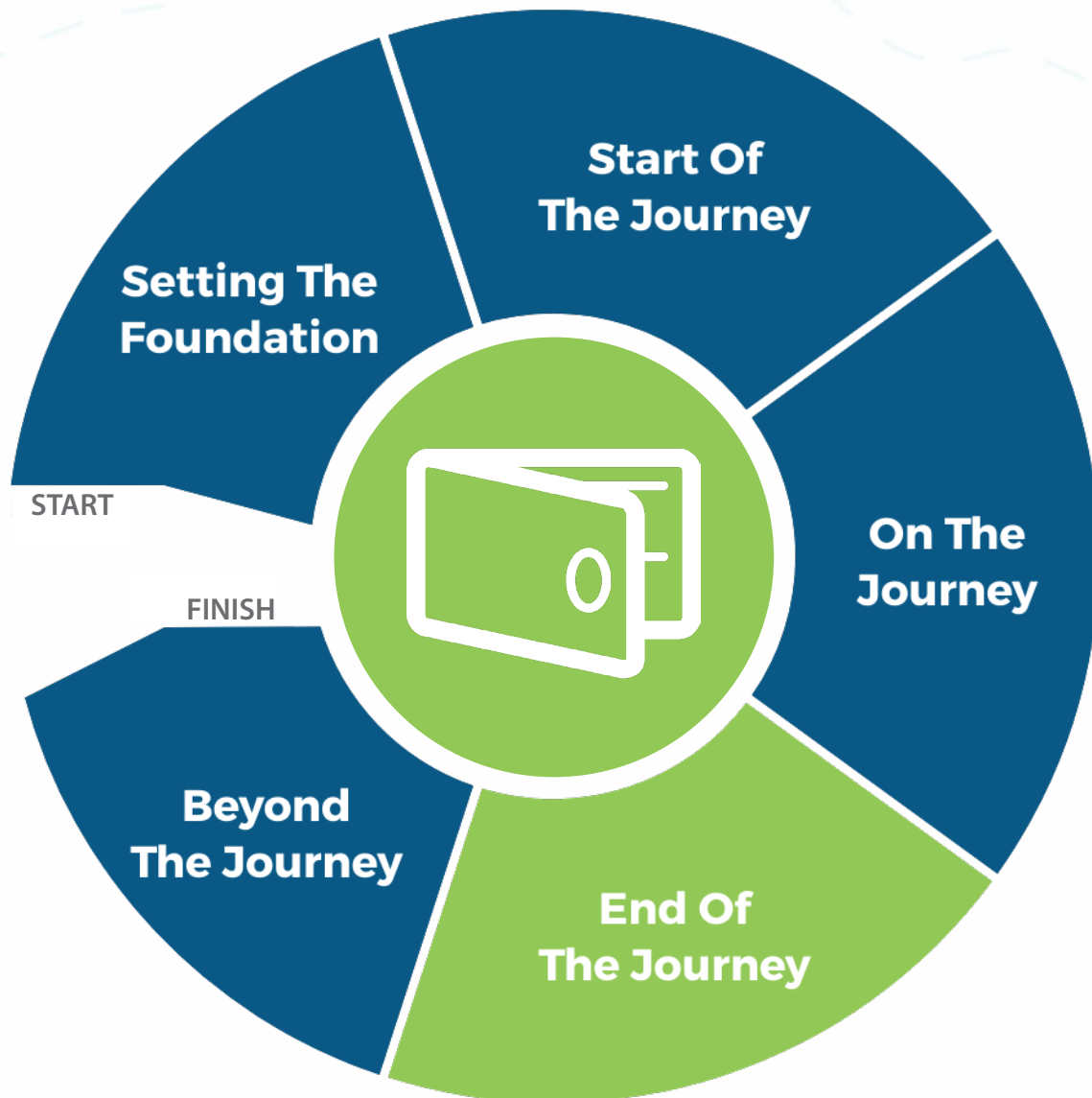
Think

Do

Primary Message

Assets





Step 5: Buying

“I’ve made up my mind and I’m ready to purchase”

Step 5: Buying

When a prospect takes the **Buying** Step, they are ready to buy. They've got to the sales page and are prepared to purchase, as long as nothing unexpected shows up to raise concerns. Their key objective is to reinforce / justify / acknowledge the decision and the positive outcome that awaits.

They are in this step if:

they know their preferred solution, are confident with you as a potential vendor / provider, and haven't yet completed the initial transaction.



Stay in this step until the client's money has been deposited in your bank account, or a deferred payment plan / contract is signed.





Feelings during the **Buying** Step can include:

Feeling

- > Excited, Hopeful, Eager
- > Hesitant
- > Ready, but skeptical
- > Self-doubt
- > Fear of bad decision
- > Fear that they are the problem

Want them to feel

- > Certain it's the right choice
- > Safe / Secure
- > Eager to Start
- > Positive change in status
- > Trusting
- > _____

What are your prospects feeling during the **Buying** Step?
(write any that may apply)

Feeling

Want them to feel

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Thoughts during the **Buying** Step can include:

Thinking

- > Am I really ready?
- > Is this real? Or a scam?
- > What if they don't deliver ?
- > What will my spouse think?
- > Can I afford to do this? Do I have the time / focus?

Want them to think

- > I trust them / this is real
- > I like this provider
- > Can't wait to get started!
- > This is the best choice for me
- > No brainer
- > No risk

What are your prospects thinking right now, during the **Buying** step?
(write any that may apply)

Thinking

Want them to think

<input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____	_____ _____ _____ _____ _____ _____ _____ _____
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------

Rank from Most Likely (1) to Least Likely (10)





Activities during the **Buying** Step can include:

Doing

- > Carefully reading cart page
- > Looking for incongruence
- > 2nd look at closest options
- > Look for warning signs
- > Asking if they will follow thru
- > Calculating economic impact

Want them to do

- > Read testimonials
- > Read guarantee
- > Purchase / enter contract
- > Close off other options
- > Get started quickly
- > _____

What activities are your ideal prospect engaging in during the **Buying** Step?
(write any that may apply)

Doing

Want them to do

<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Rank from Most Likely (1) to Least Likely (10)



Marketing Assets & Messages

Asset types appropriate for the **Buying** Step include:

Assets


- > Security seals / Guarantee
- > SSL Certificate
- > Familiar cart
- > Testimonials
- > Live Chat
- > Phone #, Location, Address

Messages

- > You can confidently purchase from [co]. Every purchase comes with a [guarantee / risk reversal]. Ready to [outcome they seek]? Join over X satisfied clients, like [names]! Need help completing your purchase? Chat with a friendly member of our team now, or call us!
- You're one step away from (outcome they want).

List the assets and messages you feel will most likely move your prospect from **Buying** to **Post Purchase**.

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

 Rank from Most Likely (1) to Least Likely (10)





FROM

TO

Feel

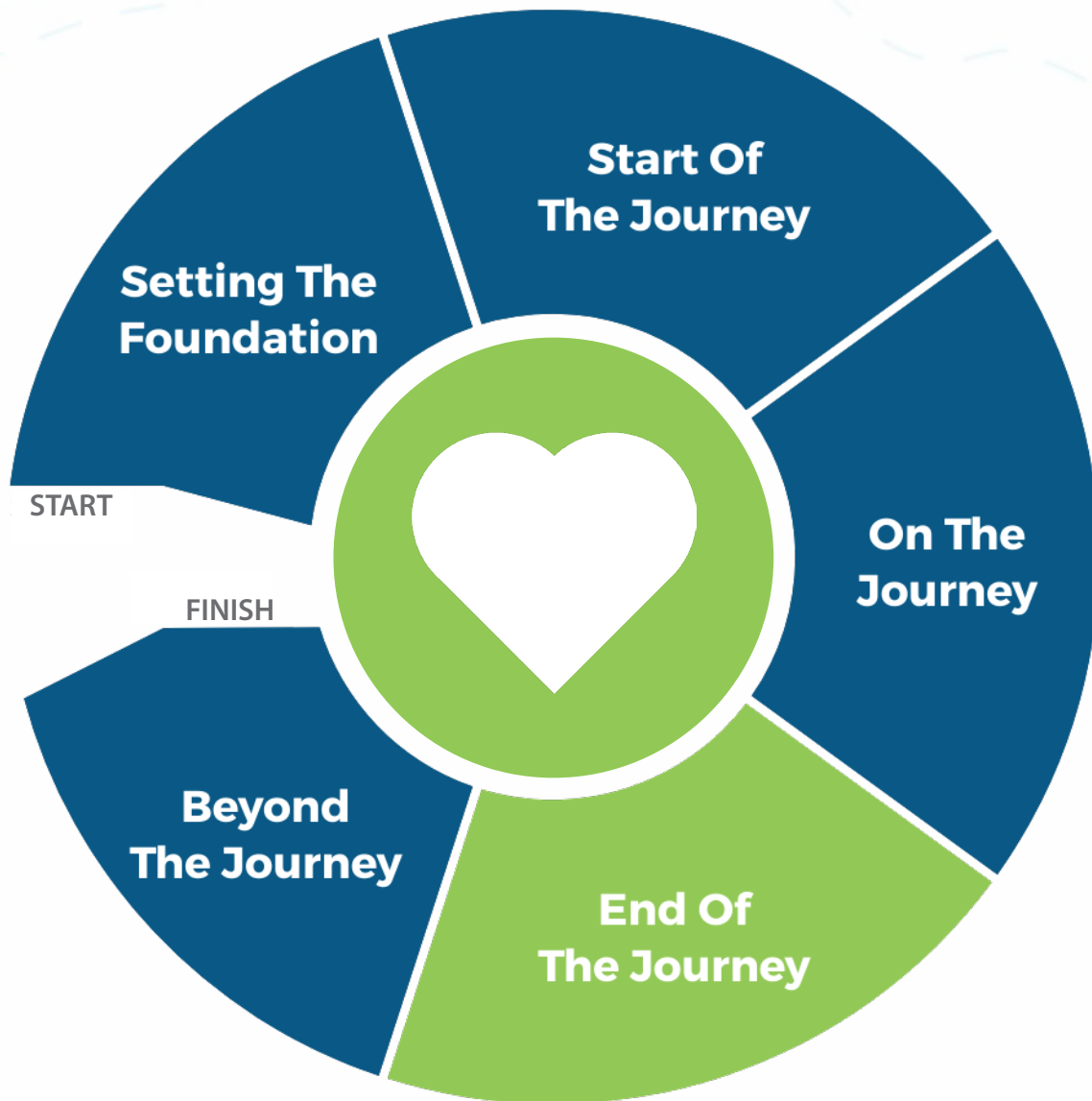
Think

Do

Primary Message

Assets





Step 6: Post Purchase

“I’ve made my purchase! Now what?”

Step 6: Post Purchase

When a prospect takes the **Post Purchase** Step, they are now your customer, under your care, and have higher expectations than when they first met you. They are also evaluating their decision, looking for signals of confirmation that they made a good choice and elevated their status. NOW is the time to . delight and surprise, and set the tone for the experience to come (think . Apple Computer packaging, Ritz Carlton Checkins, Chick-Fil-A drive thru).

They are in this step if:

they just made any purchase from you, even if they've purchased from you in the past.



Stay in this step until they've completed the engagement AND received the expected results. Your goal is Advocacy!





Feelings during the **Post Purchase** Step can include:

Feeling

- > Buyer's remorse
- > Enthusiasm
- > Judgmental
- > Relieved
- > Cautiously optimistic
- > _____

Want them to feel

- > Delighted & Surprised
- > Confirmed / Validated
- > Positive change in status
- > Grateful
- > Appreciated & Respected
- > _____

What are your prospects feeling during the **Post Purchase** Step?
(write any that may apply)

Feeling

Want them to feel

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Thoughts during the **Post Purchase** Step can include:

Thinking

- > Hope this works / I can do it
- > Hope this isn't a fraud
- > I can always ask for a refund
- > I need to get this done
- > Ok, I'll get to this later
- > _____

Want them to think

- > Best. Decision. Ever.
- > Better than I thought
- > I can't wait to get started!
- > I'm so glad I did this...
- > I made a wise choice
- > _____

What are your prospects thinking right now, during the **Post Purchase** Step?
(write any that may apply)

Thinking

Want them to think

<input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____	_____ _____ _____ _____ _____ _____ _____ _____
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------

Rank from Most Likely (1) to Least Likely (10)





Activities during the **Post Purchase** Step can include:

Doing

- > Purchase. Save credentials.
- > Mark guarantee date on cal.
- > Next item on checklist
- > Jump in fast and get started.
- > Binge. Open Product.
- > Telling people they "did it"

Want them to do

- > Take a moment, anchor.
- > Get started as soon as possible
- > Achieve small, immediate win
- > Establish momentum
- > Engage in group
- > Provide early positive feedback

What activities are your ideal prospect engaging in during the **Post Purchase** Step? (write any that may apply)

Doing

Want them to do

<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Rank from Most Likely (1) to Least Likely (10)





Marketing Assets & Messages

Asset types appropriate for the **Post Purchase** Step include:

Assets

- > Welcome emails
- > Onboarding process / calls / scripts
- > Private FB Group
- > Badges / Recognition
- > Welcome gift

Messages

- > You've just taken the first step towards [outcome they want]. Hey - I want to recognize and acknowledge you, and let you know how much I'm looking forward to helping you [achieve this outcome]. Welcome to the [brand] family / community. We're so glad you've joined us. Here's what you can expect over the next [period of time].

List the assets and messages you feel will most likely move your prospect from **Post Purchase** to **Advocacy**.

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Rank from Most Likely (1) to Least Likely (10)



FROM

TO

Feel

Think

Do

Primary Message

Assets





Step 7: Advocacy

“I can’t wait to share my experience (good or bad)”



Step 7: Advocacy

When a prospect takes the **Advocacy** Step, they are doing what most clients do
- sharing their experience (good or bad). The key - is making certain they
advocate FOR you, and not AGAINST you.

They are in this step if:

they have formed a strong opinion about
working with you, for or against.



Stay in this step until you do something to change their impression of the
experience.





Feelings during the **Advocacy** Step can include:

Feeling

- > Extreme satisfaction
- > Gratitude
- > Extreme disappointment
- > Resentment, Failure
- > Successful, Accomplished
- > Taken advantage of

Want them to feel

- > Grateful
- > Loved, Respected, Appreciated
- > Connected, Belonging
- > Empowered
- > They won
- > _____

What are your prospects feeling during the **Advocacy** Step?
(write any that may apply)

Feeling

Want them to feel

<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____

Rank from Most Likely (1) to Least Likely (10)





Thoughts during the **Advocacy** Step can include:

Thinking

- > Based on the experience you created...
- > Wise
- > I made a mistake
- > Nothing at all...(also bad)
- > _____

Want them to think

- > Best. Decision. Ever.
- > Need to tell others
- > I love this company
- > How can I help?
- > I can make a difference
- > I owe them my gratitude

What are your prospects thinking right now, during the **Advocacy** step?
(write any that may apply)

Thinking

Want them to think

<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

↑ Rank from Most Likely (1) to Least Likely (10)





Activities during the **Advocacy** Step can include:

Doing

- > Engaging with you more
- > Doing nothing
- > Telling people how great you are, and singing your praises
- > Writing bad reviews
- > Disparaging you, complaining

Want them to do

- > Write positive reviews
- > Give testimonials
- > Refer clients
- > Advocate / Engage
- > Become a Guide / Mentor
- > Help others who doubt

What activities are your ideal prospect engaging in during the **Advocacy** Step? (write any that may apply)

Doing

Want them to do

<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Rank from Most Likely (1) to Least Likely (10)





Marketing Assets & Messages

Asset types appropriate for the **Advocacy** Step include:

Assets

- › Customer Survey
- › Client Recognition
- › Testimonial Program
- › Referral Program
- › Special Appreciation events
- › Loyalty Program

Messages

- › The greatest measure of our service to you is your referral.
- Our business wants more customers just like you - which is why we've created our referral program.

List the assets and messages you feel will most likely promote **Positive Advocacy**, repeat business and **Referrals**.

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

↑ Rank from Most Likely (1) to Least Likely (10)





FROM

TO

Feel

Think

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Primary Message

Assets



Insights and Action Steps

What did you learn in this workshop that was new to you or that you found challenging?

What insights did you glean that you want to be sure to remember?

Based on your experience in this workshop, list any additional action steps you need to take now or plan to take in the future.



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