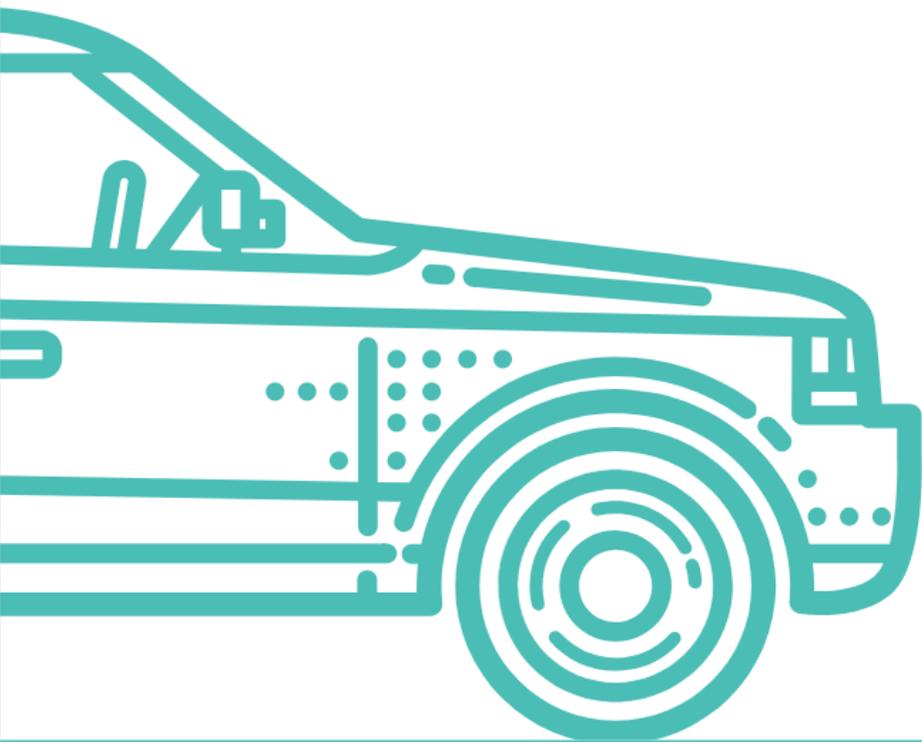


NOMISMA PRESENTS: THE PERFECT CUSTOMER JOURNEY



**DELIGHT YOUR PROSPECTS AT EVERY STAGE OF
THE CLIENT ACQUISITION PROCESS.**

A customer journey represents the experience of your prospects at each stage of the client acquisition process.

To provide the best customer experience, you must know what your prospective clients expect from you at every stage of the journey.

To do this, you must map your customer journey. This simple process will provide the information that will define your future marketing efforts.

It will enable you to turn curious prospects into delighted clients. And those happy clients will increase your retention rates, improve the chance of referrals and develop into more profitable relationships.



Introduction

To discover what your customer's feel and how you can best serve them through the different steps of the decision-making funnel, you must create a client journey map.

Mapping their journey helps you understand what your customer's feel, how your customer's think and why they behave the way they do.

It is a very useful process that tells you how clients arrive at their decision and why some choose to engage your services, and why some don't.

Once you know why prospects are not engaging with your firm, you know what information needs to be available, at a specific time, for customers to choose your practice in future.

The process is similar to creating client personas but customer journey mapping goes beyond trying to deduce what type of client you are selling to. Instead, it focusses on the questions the persona is asking and expresses a customer's experience over time, rather than as a snapshot.

The Stages of the Customer Journey

There are many variants of the customer journey, but we categorise it in these 4 stages:

Awareness – client realises they have a problem they need solving, i.e. payroll

Investigation – they research the available solutions, in this case, available accountants

Acquisition – they begin to use an agent to satisfy their need

Loyalty – customers build rapport with their accountant

The beauty of accountancy is that a journey does not have to end. If you continue to delight your customers then they will continue to engage your services.

To successfully grow your client base, you must embark on a continuous cycle of attracting clients, and impressing them throughout the stages of their customer journey.

Why Must We Map the Journey?

A good idea to solve a problem is not enough. You must clearly understand the questions that your prospects are asking, and how your firm is answering them.

At each stage of the journey, your client will experience four micro-moments. That is, what they are seeing, thinking, doing and caring about.

In each stage of the decision-making funnel, you need to satisfy the prospects in their micro-moments.

To do this you must ask why your client is engaging your services.

While you might think, an SME uses your payroll service to ensure their staff get paid correctly and on time, the actual reason can go deeper. It could actually be that:

They aren't good with numbers and they dread payroll each month
It is time-consuming and they miss out on time with their family because of it
The piece of mind that they are fully compliant makes them more productive
They simply can't be bothered

Understanding the reasoning that fuels their desire to utilise your services will enable you to impress them throughout their decision-making process. If you know that your service allows the business owner to spend Sunday afternoon with his family rather than doing payroll, you can portray that benefit in your marketing.

Mapping your customer journey

Mapping is a simple but specific process, and it requires some prior planning by you and your team.

Your customer journey map will consist of these 5 stages:

1. Define the stages of the journey
2. Talk to your customers
3. Record your findings
4. Identify problems and define a hypothesis
5. Resolve the obstacles

1. Define the stages of the Customer Journey Map

While each customer journey will vary slightly depending on the service required, each prospect will pass through the following stages:

- **Awareness:** customers realize that they need to solve a problem
- **Investigation:** they research what's available in the market
- **Acquisition:** they start to use an accountant to satisfy their need
- **Loyalty:** customers are engaged in a lasting relationship with their agent

To map the journey, we must think about the micro-moments customers experience at each of the stages. What will they be thinking throughout the process?

When we know how to impress their micro-moments at these stages, we can work with them through their journey.

2. Talk to your customers

To understand how your prospect's think at each stage of their journey, there is no better resource than talking directly to them.

The information you receive by conversing with your clients will provide the foundations to map your customer journey.

Whether you talk face to face or by phone is up to you, but you will need to prepare for the conversations.

Create a list of questions that cover the potential journey the customer might take.

But you must be careful.

Ensure you do not control the interview so the client tells you what you want to hear, or what they think you want to hear.

You must allow them to tell you what they think at each stage, what information they consumed at each stage that pushed them through to the next stage, and any obstacles they encountered.

Before conducting the interviews, clarify what information you want from the client. The actual questions depend on the specific offerings of your practice and the different expectations of each client.

You should design the questions so it is easy to understand the customer and their experience.

Some important questions you should answer are:

- How do they search for an accountant?
- What things do they immediately look for?
- Where do they look for the answers to their questions?
- What problems do the customers experience when trying to find information online?
- What are they doing now to address that problem?
- What makes them discount some accountants?
- What are they thinking at each stage of the journey?
- What worries them?
- What is lacking in their relationship with their current accountant?

3. Record your findings

You should be have gathered a lot of useful data from your clients. It is now time to use it.

We recommend using an online tool like Google Sheets to create a spreadsheet that you can collaborate with your team on and access at the same time from different computers.

Your customer journey map should look something like this:

The column on the left will include the micro-moments plus how they rate their customer experience, the opportunities to improve and the possible outcomes at this stage in the journey. The row along the top is each stage of the journey.

STAGES	AWARENESS	INVESTIGATION	ACQUISITION	LOYALTY
SEEING				
THINKING				
DOING				
FEELING				
CUSTOMER EXPERIENCE				
OPPORTUNITIES				
POSSIBLE OUTCOMES				

4. Identify problems and define a hypothesis

Now that your customer journey is mapped out, you need to identify the queries, worries and doubts the customer could encounter at every stage of their journey.

When you know their problems, you must anticipate the type of help your customers want at each stage.

List the problems that obstructed your clients:

- Customers needed to feel 100% confident about the service before committing to it.
- They needed an accountant that would be easy-to-use, fast, and flexible to their schedules.
- They wanted to know what kind of response rate they would receive.
- They wanted to know where they could find trustworthy information.
- They wanted to engage someone who could provide financial advice.
- Entrepreneurs were not sure they needed an accountant.
- Contractors wanted to be very clear about what they could not claim.

Define a hypothesis

Using your problems, you must define a hypothesis that will direct you in resolving these issues.

An example hypothesis after creating your Customer Journey Map, could be:

To acquire more medium to large clients, we need to answer as many questions as possible before they need to contact us. We need to create more information for the website and make it easier for the customer to find. When prospects do make contact, we stop talking to them too soon. Upgrading our CRM system so that we call them multiple times and add them to our newsletter list means that we can remind them of our good work and convert them if they don't engage our services straight away.

5. Remove the Obstacles

When you have your list of problems, it is up to you and your team to solve them. The key is anticipating the type of help your customers want at each stage. And the solution is often simpler than you think.

An extra bit of information on your website or more testimonials posted on your social media accounts are sometimes all it takes to turn a prospect into a customer.

Once you have worked through the stages in your customer journey map, the obstacles to engaging your practice should be apparent.

This Customer Journey Mapping edition, was the first instalment in our Nomisma Presents: The Perfect Customer Journey series.

We hope you have been able to receive some value from this guide, and can successfully work through the stages to create your customer journey map.

Our next guide will be providing advice on what you can do to improve the experience of your paying customers.

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