TRACK 2 CONSULTING

Customer Awareness and Engagement Journey

STAGES

Awareness → Interest/Evaluation → Adoption & Engagement → Loyalty → Advocacy

STRATEGIES

Awareness
- Sees digital ad
- Receives direct mail
- Browses website
- Fills contact form
- Landing page CTA
- Receives email communications

Interest/Evaluation
- Browses website
- Responds to sales call/discovery call
- Reviews case studies/testimonials
- Likes/follows on social media
- Browses articles and reviews
- Receives sales follow-up/proposal materials

Adoption & Engagement
- Welcome letter/ packet/video
- Client onboarding process
- Client-focused email marketing
- Becomes a reseller
- The company likes/ follows client on social

Loyalty
- Upsell/cross-sell: communicate full capabilities
- Receives new product info: email, video, webinar, or direct mail
- Takes advantage of new offers and opportunities
- Sales calls
- Keeps you apprised of new needs and challenges
- Shows loyalty on social media

Advocacy
- Responds to survey tools
- Leaves positive review(s)
- Connects company to other partners or clients
- Engages on LinkedIn
- Provides testimonial content or video

Evergreen Content

- Trends in your industry that could change the way you do business
- Possible industry-related whitepapers
- Resources for your customers
- Infographics

TOUCHPOINTS

	Awareness	Interest/Evaluation	Adoption & Engagement	Loyalty	Advocacy
	Digital ads (Cold) email marketing Cold calls Website Landing pages Social media Blogs/articles Videos	Sales discovery/presentation Proposal/quote Website review Landing page(s) Blogs/articles Case studies Email marketing Social media Online reviews Product/service materials Videos	Welcome materials/schwag Client-focused content Welcome email Customer service/support Contract/billing communications	Client-focused support communications New product info email New product info video LinkedIn Email marketing Surveys/feedback	Surveys/feedback Referral solicitations Email Social media Reviews/requests Case studies Video One-on-one engagement
Marketing/sales enablement	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
Sales	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
Customer service/admin	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

MEASUREMENT

Awareness
- Website traffic
- New visitors
- Digital campaign impressions & clicks
- Organic search traffic
- Sales team metrics
- Email / web analytics

Interest/Evaluation
- Contacts
- Number of qualified leads
- Website/digital: action rate, lead conversion rate, email sign-ups
- Sales meetings scheduled
- Conversions: form fills/sign-ups, downloads

Adoption & Engagement
- Sales/close rate/velocity
- Engagement with PPS team members
- Initial client feedback

Loyalty
- New sales opps
- Repeat orders
- Average contract value
- Response to client-focused offers
- Client survey results
- Referrals

Advocacy
- Repeat/new orders
- Referrals
- Survey results
- Reviews