

Masterclass Transcript Summary



Welcome & Framing

Welcome to *Design and Build an Irresistible Customer Journey*! I'm here to help you unpack your Customer Journey and, most importantly, to put your **customer**—not your product or operations—at the center of your universe.

Guiding questions:

- Why isn't your marketing converting even when your offer is excellent?
- Why don't more satisfied customers become loyal advocates?
- What do your customers *really* feel, think, and want at each stage?
- What would it take to build a business where the customer experience fuels **unstoppable growth**?

“The Journey you create becomes the **story** your customers tell.”

This masterclass is designed to help you see your business through your customer's eyes and to identify where to reduce friction, raise delight, and build trust—step by step.

Why Customer Journey Work Changes Everything

As I share in *A Force for Good* (see Chapter 7), mapping your Customer Journey helps you identify:

- **Where your customer most needs you** (moments of struggle or confusion).
- **Unspoken needs** (what they won't say—but feel).
- **Opportunities to be remarkable** (small upgrades that compound into devotion).

This also sets you up for your **Area of Chosen Greatness™**—the specific place in the Journey where you choose to be truly great.

The 17-Step Customer Journey™ (Overview)

The 17 steps are a structured way to see—from first spark to lifelong advocacy—how value, trust, and emotion move through your business:

1. Experience a problem/need/desire
2. Become aware of your company
3. Initial interaction
4. Initial connection
5. Learn about your company and solutions
6. Experience invitations to become a customer
7. Decide to say “Yes”
8. Actually say “Yes” (purchase/commit)
9. Onboarding
10. Sign agreements & make payments (separate if not instantaneous)
11. Receive the product or service
12. Experience the product or service
13. Encounter issues or challenges
14. Problem resolution
15. Buy again
16. Become a loyal customer
17. Become an ambassador

Every step is a chance to build trust, remove friction, inspire loyalty—or to lose the customer.

The Five Lenses You’ll Use at Every Step

For each of the 17 steps, look through these lenses:

1. **Physical Experience** — What they see, hear, do.
 2. **Thoughts** — Beliefs, questions, objections, resistance, desires.
 3. **Feelings & Intensity** — What they feel and *how strongly*.
 4. **Interactions** — People and touchpoints they engage (webpage, rep, video, invoice).
 5. **Systems** — Background tools affecting their experience (billing, logistics, CRM, automations, email flows, scheduling).
-

Work With One Shared Avatar

We'll use one **Shared Avatar**—a single, vividly described person—to align the team. Give them a name, values, media habits, lifestyle details, and goals. (I recommend a fictional composite you can *share across the company*.)

Example Avatar (for our demo):

- **Name:** Julie
- **Life:** Mom of five-year-old Pearl; married to Martha; lives in Brooklyn; bookkeeper finishing her MBA.
- **Values & causes:** Education; equity; LGBTQ+ advocacy; sustainability.
- **Interests & media:** Yankees fan; Park Slope Food Co-op; Prospect Park softball; library visits; *Untamed* (Glennon Doyle); *The New Yorker*, *National Geographic*, *Sierra*; podcasts like *How Women Inspire*.
- **Goals:** Be a present, supportive mom; maintain an active family life; advance her career; contribute to community.

You don't need to capture every customer. You need one clear person you can serve **consistently**.

Live Walkthrough: The 17 Steps (with Example)

To illustrate, we'll use the fictitious brand **Savvy Kids Shoelaces** and our Avatar, Julie.

Pro tip: At each step below, imagine *your* Avatar and fill in the five lenses.

1) Experience a problem/need/desire

- **Physical:** Pearl shrieks in frustration trying to tie her shoes.
- **Thoughts:** "How can I fix this quickly?"
- **Feelings:** Overwhelmed, urgent.
- **Interactions:** Sees another child's bright, wide laces at pickup.
- **Systems:** Product design (color/width) is *incidentally* visible in the wild.

2) Become aware of your company

- **Physical:** Julie asks the other mom where she got the laces.
- **Thoughts:** "Please let this be easy to get."
- **Feelings:** Curious, hopeful.
- **Interactions:** Informal peer referral; closer look at the laces.
- **Systems:** Product cues signal usability (where to place hands).

3) Initial interaction

- **Physical:** Google search → finds Savvy Shoelaces site.
- **Thoughts:** “It came right up—good.”
- **Feelings:** Hopeful, calmer.
- **Interactions:** Google ad/result; homepage.
- **Systems:** SEO/SEM, keywords, ad targeting.

4) Initial connection

- **Physical:** Short video of smiling kids tying shoes.
- **Thoughts:** “Who knew a company like this existed?”
- **Feelings:** Interested, optimistic.
- **Interactions:** Website video & copy.
- **Systems:** CMS, video hosting, brand voice guidelines.

5) Learn about company & solutions

- **Physical:** Scrolls; reads “backed by neuroscience.”
- **Thoughts:** “30% faster? That’s compelling.”
- **Feelings:** Growing confidence.
- **Interactions:** Product pages, stats, visuals of kids using product.
- **Systems:** Copywriting, visual design, content strategy.

6) Invitation(s) to become a customer

- **Physical:** CTA: **Get Laces Here!** → 12 options.
- **Thoughts:** “So many designs—fun!”
- **Feelings:** Excited, anticipatory.
- **Interactions:** Catalog, variant selector, quantity choices.
- **Systems:** PDPs, cart integration, pricing/finance integrations.

7) Decision to say “Yes”

- **Physical:** Clicks **Add to Cart** (two designs).
- **Thoughts:** “Let’s start with two.”
- **Feelings:** Focused, ready.
- **Interactions:** Cart page; reassuring microcopy.
- **Systems:** Cart UX, trust badges, performance.

8) Actually say “Yes” (commit)

- **Physical:** Apple Pay on checkout.
- **Thoughts:** “Great—fast and familiar.”

- **Feelings:** Confident, committed.
- **Interactions:** Checkout UX; confirmation animation.
- **Systems:** Payment processor, fraud checks, billing.

9) Onboarding

- **Physical:** Order confirmation: “Arrives in 2 days.”
- **Thoughts:** “Perfect timing.”
- **Feelings:** Satisfied, relieved.
- **Interactions:** Confirmation page; friendly tone.
- **Systems:** Order-to-warehouse handoff; pick/pack/ship.

10) Sign agreements & make payments (*separate when applicable*)

- **Physical:** For services: e-signature, first invoice.
- **Thoughts:** “Who is our point of contact?”
- **Feelings:** Keen, cautious.
- **Interactions:** Contract email; invoice; PO setup.
- **Systems:** e-sign tool, AR/AP, CRM notifications.

11) Receive product/service

- **Physical:** Email with video arrives same day package lands.
- **Thoughts:** “This is exactly when I need it.”
- **Feelings:** Hopeful, excited.
- **Interactions:** Unboxing; child-friendly how-to video.
- **Systems:** Logistics tracking synced with email automation.

12) Experience product/service

- **Physical:** Laces installed; video playing.
- **Thoughts:** “They’re a little tricky—will this work?”
- **Feelings:** Cautious, nervous.
- **Interactions:** Packaging card; how-to content.
- **Systems:** Instructional design; video library; CX content.

13) Issues or challenges

- **Physical:** Pearl gets frustrated; tears.
- **Thoughts:** “Uh-oh... stay calm. Try again.”
- **Feelings:** Anxious, determined.
- **Interactions:** Rewatch video; check card; re-fit laces.
- **Systems:** Content accessibility; troubleshooting tips.

14) Problem resolution

- **Physical:** Clicks “Help”; calls support; gets 5 quick micro-videos.
- **Thoughts:** “They knew exactly how to help.”
- **Feelings:** Relief → confidence.
- **Interactions:** Phone rep; emailed links; short clips.
- **Systems:** CS platform; macros; knowledge base; SLAs.

15) Buy again

- **Physical:** Orders two more pairs next week.
- **Thoughts:** “These designs will make it fun.”
- **Feelings:** Happy, satisfied.
- **Interactions:** Website; order history; re-order shortcuts.
- **Systems:** CRM, personalized recommendations, loyalty offers.

16) Become a loyal customer

- **Physical:** Purchases for every five-year-old’s birthday.
- **Thoughts:** “I know exactly what to gift.”
- **Feelings:** Confident, delighted.
- **Interactions:** Saved payment; bundles.
- **Systems:** Subscriptions/sets; reminders; post-purchase flows.

17) Become an ambassador

- **Physical:** Records an Instagram reel about the laces.
 - **Thoughts:** “Other moms need to know this.”
 - **Feelings:** Empowered, enthusiastic.
 - **Interactions:** Social platforms; school partnership idea.
 - **Systems:** UGC prompts; referral program; hashtag tracking.
-

Harvest the Wisdom (Debrief Prompts)

1. **Critical emotional moments:** Where could emotions derail the purchase or loyalty?
 - *Insight (Julie):* Peak emotion occurs during first-use. We must ensure “first try” feels like a *win* (even if no shoe is tied yet).
2. **What surprised you?**
 - *Insight (Julie):* We need reasons to re-order (gifts, new designs, adjacent products like socks or shoe charms).
3. **Where are the greatest hopes and desires?**
 - *Insight (Julie):* “First success” together—unboxing + guided practice must be joyful, pressure-free, and celebratory.
4. **Where are the biggest doubts and hesitations?**
 - *Insight (Julie):* Fear of failure, child’s frustration, and mom-guilt. We must normalize the learning curve and coach the parent emotionally—not just functionally.
5. **Where are we already good? (Top 3)**
 - *Insight (Julie):* Kid-friendly instruction videos; smooth online experience; product form-factor (wide, tactile laces).
6. **Where must we choose to be truly great? (Area of Chosen Greatness™)**
 - *Insight (Julie):* **The first-experience moment.** It should feel fun, engaging, celebratory, and pressure-free—every time.

Connect to Your 4-Page Growth Plan™

Use your Journey insights to update:

- **Who They Are / What They Need** (Page 1–2)
- **WHO + WHAT Statement™** (tighten your promise in the customer’s language)
- **Triggers** (catalog precise “why now” moments)
- **Positioning** (speak to desired feelings, not just features)

Also feed these into:

- **Three Customer Experience Improvements™** (pick 3 high-leverage upgrades for the next 90 days)
 - **Customer Enrollment & Retention Funnel Designer™** (map mechanics from *suspects* → *ambassadors*)
-

Make It Stick: Habit + One High-Potency Action

Install a High-Leverage Habit™ (recurring):

- Review *one* Journey step in every weekly leadership meeting.
- Host a monthly **Voice of the Customer** reflection session.
- Share one customer story every Friday; name the step it illuminates.
- Revisit and update the map quarterly.
- Include the Journey in new-hire onboarding.

Ship one High-Potency Action™ (this week):

- Interview **3 customers** to validate your map.
- Create a visible Journey wall in your office.
- Train the team to use the five lenses in daily decisions.
- Fix your **top 2 friction points** (start where emotions run highest).
- Draft a 17-step customer story in narrative form (for empathy training).

“Scale doesn’t come from more transactions; it comes from more moments of **trust.**”

Tools & Next Steps

- **Customer Journey Map™ (free this week):**
aforceforgood.biz/weekly-tool
 - **Book — A Force for Good** (includes the toolkit + Chapter 7 on Area of Chosen Greatness™ and the 17 steps):
aforceforgood.biz/book
 - **Growth Accelerator** — 12-module online system with videos, tools, assessments; solo or team access; partner with a coach. *Tiered pricing starts at \$599.*
aforceforgood.biz/accelerator
-

Closing

A remarkable business isn't built in conference rooms—it's built in the unseen moments when customers decide to believe in you. Map those moments. Design them with care. And revisit them until your customer experience becomes your growth engine.

“The best companies don't just meet needs. They anticipate **feelings**—and rise to meet them.”

Let's go make the world better through women-led business.