



**Cultivate Advisors<sup>®</sup>**

*Creating Process Around the  
Customer Journey*

SYTA Mastermind



## Our Mission:

To partner with committed entrepreneurs in propelling their businesses beyond expectations

Make  
Manufac  
Mentor  
Members  
Midwest  
Machines  
Markets

— •

# Hello! I'm Andrea Ross

Business Advisor



Cultivate Advisors™

# OUR METHODOLOGY TO PROPELLING BUSINESSES



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# Why We're Here

**Purpose:** To think through your Customer Journey

**Outcomes:**

1. Identify Gaps in your Process
2. Two Takeaways to Increase your Conversion and improve your customers experience

**SMALL CHANGES =  
BIG RESULTS**



# Agenda

01

Tracking the Source

02

Building the process

03

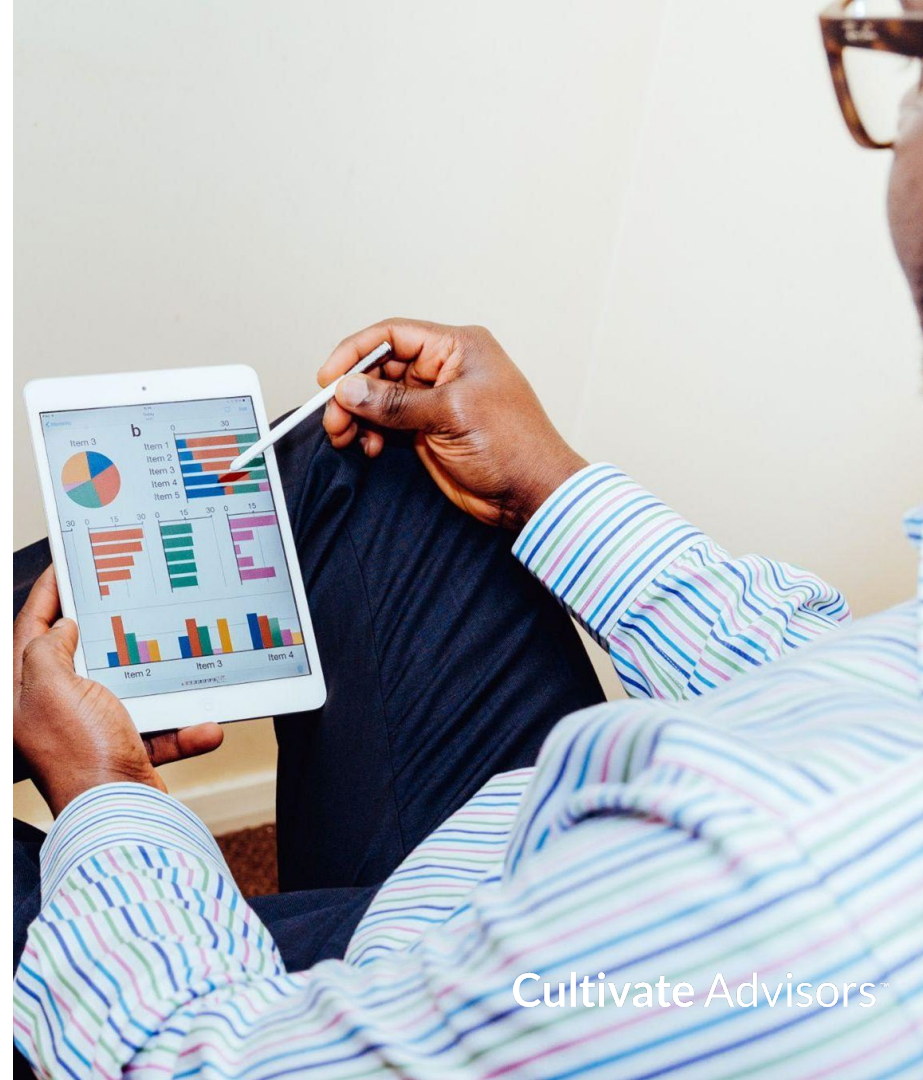
Training on the process

04

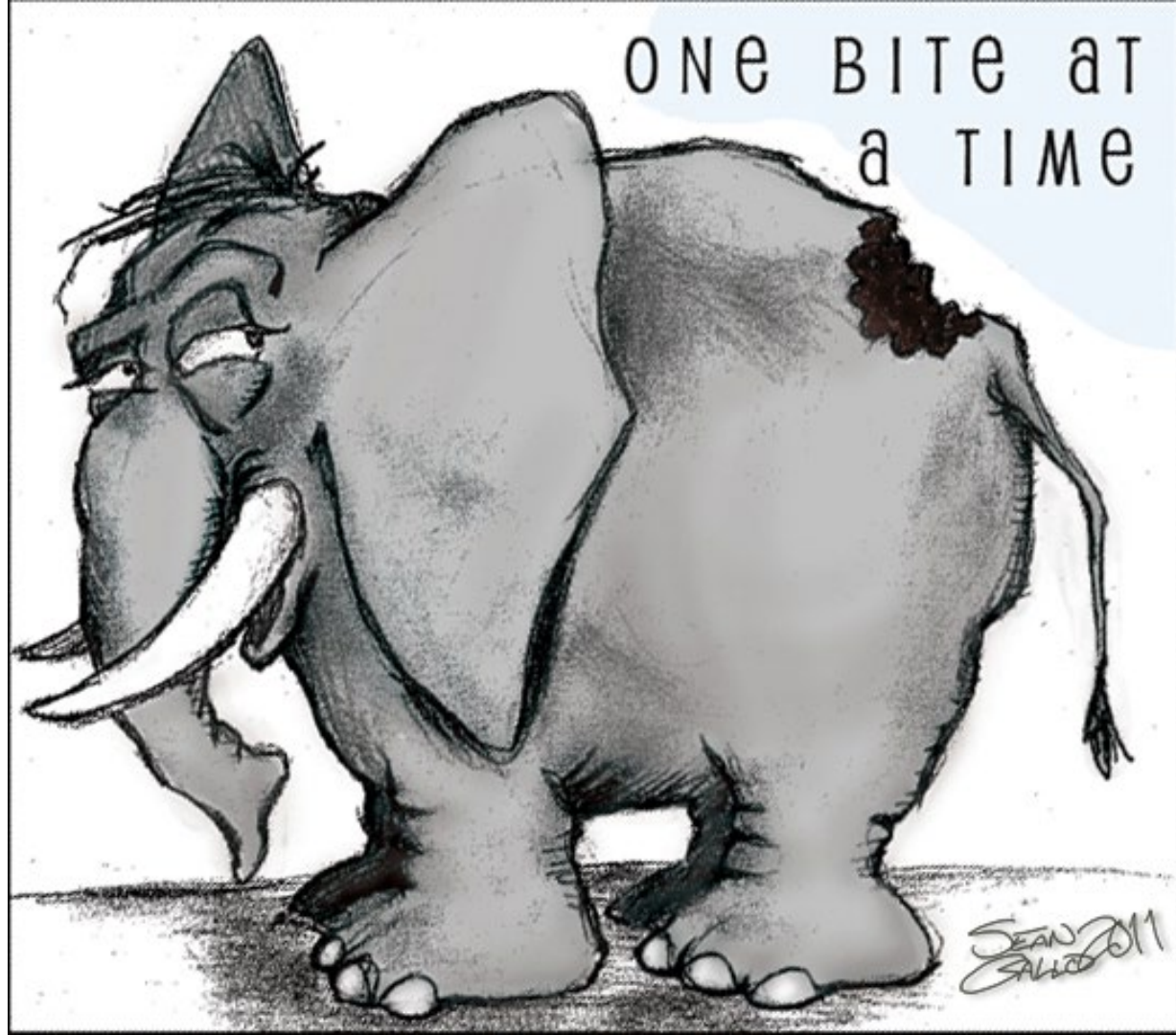
Tracking outcomes

05

Next Steps



I'm going to approach each step today as one bite at a time



# Tracking the Source

Why is it important to know where your lead came from?

- Feedback to your marketing team
- Budgeting reasons
- Understanding who your clients are and the messaging that brought them in.
- Making sure you have a diverse source stream.





# Know Your Source

A2:E2 | fx

	A	B	C	D	E	F	G	H	I	K	L	M
1	Sales Manager	Lead Date	Lead Type	Source	Method of Contact	Date of Travel	Destination	Company/School Name	Group Name/Description	Contact Name	Mobile Number	Email
2	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>							
3	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>							
4	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>							
5	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>							
6	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>							
7	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>							
8	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>							
9	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>							



## How do you currently track source?

- How are you currently tracking where your leads are coming from and if you don't currently track source, how could you start?

# Building out the process

Why is it important to have a documented process?

- **Consistent for the team and for clients.**
- **It allows for smoother onboarding of new hires.**
- **It allows for resource building.**
- **It can be tested and tracked...what's your teams conversion rate?**

# Building The Process

## BPLLC Customer Sales Journey

Delegated To	Task	Tools/Resources
Sales	Outreach/Networking	
Client	Reaches out for service	
Sales	Replies with Erica cc'd, introducing questionnaire	Email Template
Erica	Erica adds contact into lead tracking system (Karbon)	
Erica	Erica sends email and questionnaire	Email Template/Questionnaire
Client	Fills out questionnaire and submits with <a href="#">Discovery Call request</a>	Set up <a href="#">Discovery Call</a> calendar
Erica	Follow up email after one week	Email Template
Tracy + appropriate account manager	Runs Discovery Call and book next call	<a href="#">Call agenda</a>
Tracy	Send recap and Ignition proposal	Email Template
Tracy	Proposal Review Call	Call agenda
Client	Say yes on the call or need to review	
Tracy	Send revised ignition proposal with level they chose	
Erica	Sends follow up after one week	Email Template
Client	Submit signed proposal	Proposal template

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## Do you have a clearly written Customer Journey?

- Have you written it out so your team is clear on the process and linked to the training and resources available? If not, who should be involved in that process?

# Training The Team

Why is it important to have a set training plan around our customer journey?

- **Confidence and clarity for our team.**
- **Sets clear expectations and defines guardrails.**
- **Makes tracking possible.**
- **Allows us to hold our team accountable.**



# Coaching Checklist

	A	B	C	D	E	F	G	H
1	Step	Coach	Demonstrate	Observe	Proficiency	Efficiency	Mastery	Resource
2	Gift Shop							
3	Schedule for gift shop team	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
4	Inventory management	Renee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5	Daily cleanliness check	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
6	Manage team breaks and dock hand support	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
7	Sales process	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
8	Sales training for team	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
9			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10	Vessel/Crew Operations Management							
11	Scheduling for captains and crew	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
12	Run bi-weekly Zoom Captain's Meetings	Dustin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
13	Run monthly in-person crew meetings	Dustin and Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
14	Meeting Agendas	Dustin and Renee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
15	Meeting Recap and clear action items	Dustin and Renee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
16	Understand company policies and handbook	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
17	ExpandShare	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
18	Disciplinary/Counseling Forms	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
19	Deputy Journals	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
20	Quarterly crew evaluations	Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21	Site Upkeep	Dustin and Renee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
22			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
23			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

# Tracking Outcomes

**Why is it important to track the outcomes and how do we go about it?**

- **Allows us to know what is working and what isn't**
- **Helps us set KPIs for our team with clear expectations and accountability.**
- **Shows us where we can improve.**
- **As leaders it gives up opportunities for insight and training.**



# Conversion Rate Tracking

Tours Booked For 2025 Revenue Goal	\$2,450,000	\$1,225,000	\$1,225,000	\$612,500	\$1,225,000	\$1,225,000	\$0	\$0	\$2,450,000	\$1,225,000	\$612,500	\$0	\$12,250,000
Tours Booked For 2025 Revenue Actual													
Average Tour Revenue Goal	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000	
Average Tour Revenue Actual													
Confirmed Tours Goal	70	35	35	18	35	35	0	0	70	35	18	0	350
Confirmed Tours Actual													
Conversion Rate Goal	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	
Conversion Rate Actual													
Bids Goal	100	50	50	25	50	50	0	0	100	50	25	0	500
Bids Actual													
Conversion Rate Goal	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	
Conversion Rate Actual													
Leads Goal	200	100	100	50	100	100	0	0	200	100	50	0	1,000
Leads Actual													

# TAKEAWAYS

What are 2 things you don't want to forget?



A WORLD  
MADE BETTER BY  
ENTREPRENEURS

THANK  
YOU!

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