

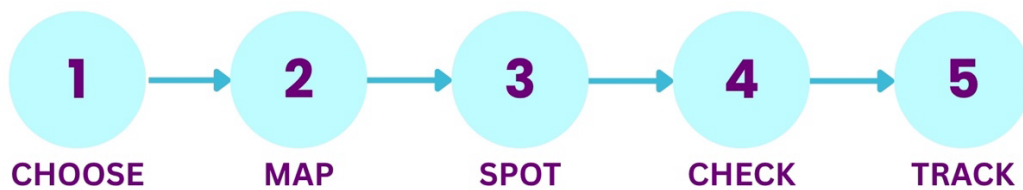
Build your first customer journey map

A worksheet for busy New Zealand business owners

This worksheet helps you see your business through your customer's eyes. Work through each section in order. There are no wrong answers — use what you already know about your customers, then check it against real feedback when you can.

Set aside 45 to 60 minutes. Grab a coffee, and work through this on your own or with your team.

Your worksheet at a glance



01

Choose your customer and journey

Add brief descriptions in the box below.

Persona (customer type) :
Persona description:
Their journey (eg first appointment):
Why this customer journey matters to your business right now:

Tip: Not sure which customer to start with? Pick the type that brings in the most repeat business or referrals.

Sketch your customer persona

A simple profile for the persona you named in step 1

Fill this in from what you already know. A few honest words in each box are enough; you can add more detail later.



Name

One-line description (role, situation, or need)

What are their goals?	What frustrates them?
Where do they find you?	What does good service look like to them?

In their own words

A short quote or comment that sums up how this customer feels about your business.

Tip: Keep this persona in front of you while you fill in the stages on the next page. Every box on that map should describe how this specific person behaves.

02

Map the stages your customer moves through

For each stage, write what your customer does, the touchpoints you control, what they expect and feel, and any pain points. Keep it short — a few words per box is enough.



Stage	What they do	Touchpoints you control	What they expect and feel	Pain points
Awareness — they notice you				
Consideration — they check you out				
Purchase — they decide and buy				
After the sale — they use it and get support				
Advocacy — they return or tell others				

03 Spot quick wins and bigger fixes

Look back over your map. Circle the stages where customers seem to struggle or drop away most.

Quick wins (you can start this month)

☐ _____

☐ _____

☐ _____

Bigger fixes (need more time, budget, or planning)

☐ _____

☐ _____

Tip: Look for the stage where most customers hesitate or drop off. That is usually where a small change makes the biggest difference.

04 Check impact and choose your changes

Choose three to five changes from your quick wins and bigger fixes. For each one, write down what you will measure, where you are starting from, and what success looks like.

- ☐ What number tells you this stage is working? (enquiries, conversion rate, repeat bookings, reviews, response time)
- ☐ What is that number today?
- ☐ What number would count as a win?
- ☐ Who on your team owns this change?
- ☐ When will you check it again?

Change you will make	Measure you will track	Starting point	Target	Review date

Tip: Choose measures you already track, like enquiries or repeat bookings, so checking progress does not create extra work.

05

Track results and update your map

Come back to this page on your review dates. Write down what actually happened, what it tells you, and what you will do next. Update your map above if the journey has changed.

Review date	Result against your target	What this tells you	Next step

Questions to ask at each review

- ☐ Did the change move the number you were tracking?
- ☐ What did customers say or do differently?
- ☐ Is this change worth keeping, adjusting, or dropping?
- ☐ What is the next stage on your map that needs attention?

Want help working through your map? A Business Mentor can talk it through with you and help you turn your findings into a plan.