

springcm

Mapping the

PROSPECT JOURNEY

Report

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Project Scope

Goal

This project showcases the journey prospects take from awareness of SpringCM to becoming a customer. This research resulted in gathering data that captures the experiences and emotions people have along the way.

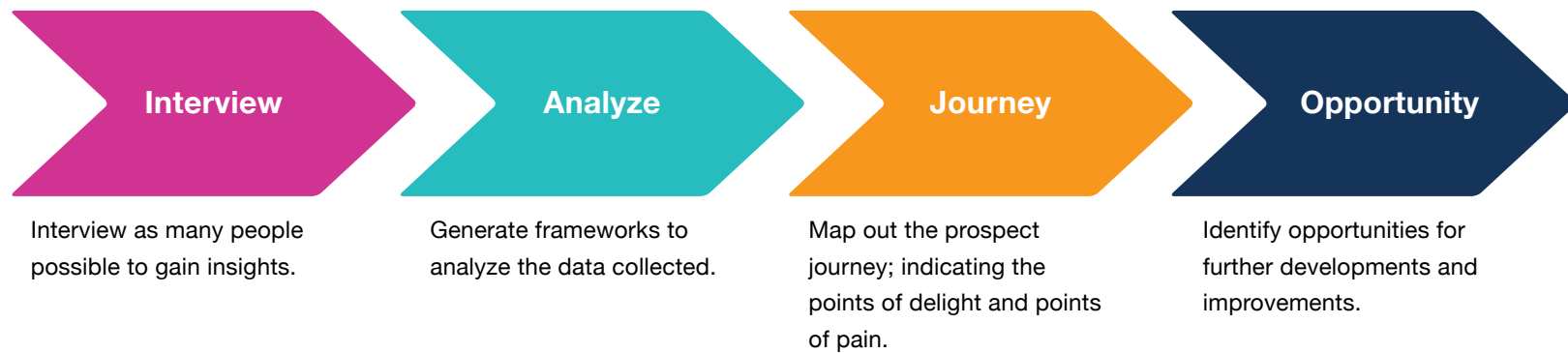
The process is centered around conducting interviews and user tests with current customers, SpringCM employees, and non-customers. These findings translate into a prospect journey map that identifies gaps and opportunities for improvements.

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Process

This research project involved doing primary research about the company, speaking to customers and finally gathering all insights to create a journey map.



1.0 Primary Research

Approach

The interview process was divided into three distinct groups; the internal SpringCM team, the current customers, and non-customers. The initial step is to understand how prospects are funneled internally between teams. These insights were then gathered and helped construct interview questions for current customers. Non-customers were interviewed to understand how SpringCM, as a brand, is perceived by individuals who are not familiar with the company's products.

1.1 Creating an Ecosystem

Ecosystem Map

The ecosystem map indicates different parts of the system that are important for the customer experience. The different layers show different touch points a customer has; i.e. from the initial interaction with SpringCM to other influential aspects that are part of the journey.

Touch-points

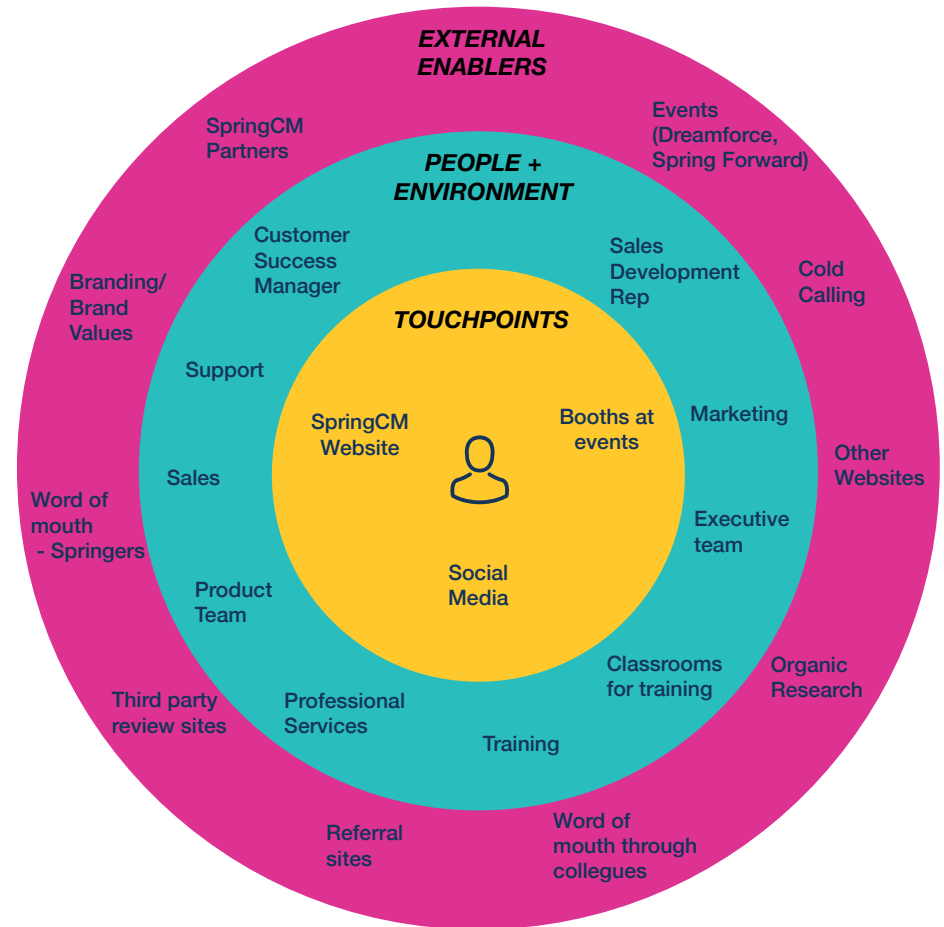
These aspects are one of the initial avenues a customer interacts with. For example, the SpringCM website is an important touch-point since it shows the brand and its services. This experience needs to be a delightful one for the customer.

People + Environment

This section shows all the different people associate with the customer experience. Generally, different teams within the company are part of the ecosystem since they are the secondary touch points for the customer.

External Enablers

These entities influence the experience, but the customer may or may not be directly interacting with these touch points. Keeping in mind the experience with these entities is important.



Interview guide for internal teams

1.2.1 Marketing Team

Key Questions

Question 1: What would you say are some of the most successful ways we are reaching out to potential customers?

Question 2: What are some methods that the team is currently exploring and what impact do you think it may have?

Question 3: What is the criteria for further pursuing a potential customer? What are the determining factors?

Question 4: Please describe the amount of traffic you get from each platform? Eg. inquiries through website, social media platforms etc. (where can i find this information).

Question 5: I am working towards conducting user tests for the website; do you want to know any information in particular? Anything about how exactly a user is navigating through the website?

Insights + Key Findings

Insight 1: Chat-bot works really well, since users do not have to commit and provide any personal information. It is also less formal, compared to filling out a form.

Insight 2: Engage website visitors without having them to “request” for resources. For example, “getting a demo is not the best experience” (Katie).

Insight 3: There is a lot of content on the website that can be overwhelming for the visitor. How might we condense the information and still have it informative and educational? (Optimize the information)

Insight 4: Effectively showing the SpringCM is a great platform for customers who are looking for content management solutions. How might we show a problem and then present a solution (instead of just presenting a solution)?

Insight 1.2.5: How can we better reflect our internal culture on the website?

Key Quotes

“Requesting a demo is not the best experience” - Katie (act more context)

“There is a lot of content on the website, optimizing the information might result in a better experience.” - Katie

Interview guide for internal teams

1.2.2 Sales Development Representative

Key Questions

Question 1: How do you develop leads?

Question 2: What are some strategies you use during conversations with leads?

Question 3: What happens to leads that do not move on to the sales team?

Insights + Key Findings

Insight 1: The team structures the conversation around the user's needs and wants. This allows them to use SpringCM products as solutions.

Insight 2: One of the challenges is reaching out to cold prospects without initiatives.

Insight 3: 70% opportunities are from marketing.

Insight 4: How do you qualify leads?

Key Quotes

"The team structures the conversation around customers' pain points" - TJ

"I am interested to know how do we nurture prospects who do not get passed down the funnel?"

Interview guide for internal teams

1.2.3 Sales

Key Questions

Question 1: What are some ways you reach out to customers? Please describe your methods?

Question 2: What are some challenges with reaching out to new/potential customers?

Question 3: What are some criteria to pursue a potential client?

Question 4: What are some ways you keep clients engaged before they decide to move to the purchasing stage?

Question 5: Describe a typical conversation you might have with a new customer?

Question 6: Describe a typical conversation you might have with a customer you are reaching out to again?

Question 7: Since, the platform is so content, what are some way you educate new customers about the product and its features?

Insights + Key Findings

Insight 1: Standing out amongst competitors and creating a strong value proposition has been challenging

Insight 2: Alignment with marketing is lacking. Sales team is not sure about marketing efforts and vice versa.

Insight 3: Generating a new Scope of work for every customer is time consuming.

Key Quotes

"It is hard to stand out among competitors and really communicate why are we better" - Mike Newlin

Interview guide for internal teams

1.2.4 Professional Services

Key Questions

Question 1: How do you keep in touch with customers regarding product implementation?

Question 2: How do you keep in touch with customers and schedule meetings?

Question 3: Why does implantation take so long? And why do customers have to wait for so long to completely integrate SpringCM in their work space?

Insights + Key Findings

Insight 1: It is hard for customers to understand that implementation takes a lot of time and planning.

Insight 2: Sales oversells the product often, which makes it very challenging for PS to deliver.

Key Quotes

"I wish customers knew more about the implementation cycle prior to starting it. It will really make it easier for our team to deliver and have appropriate conversations with our customers."

- Dinesh

Interview guide for internal teams

1.2.5 Customer Success Manager

Key Questions

Question 1: What are some ways Spring keeps a good relationship with its customers?

Question 2: What do you think are some of the challenges in keeping in touch with customers?

Question 3: How do customers reach out to you/keep in touch? (email/phone call/in person meetings, if so, how are they scheduling etc.)

Question 4: Can you tell me a “happy-path” story? (An ideal engagement with customers)

Insights + Key Findings

Insight 1: Cross-selling is a challenge sometimes since other teams do not see the value of Spring products yet.

Insight 2: Talking to customers regularly really helps with keeping up with their needs and solving them. Communication with customers is key to customer success.

Key Quotes

“We talking to customers weekly to make sure they are comfortable and feel heard.” - Khyle Keys

Interview guide for internal teams

1.2.6 Training

Key Questions

Question 1: What is the process/content? And how do you go about planning it?

Question 2: How do you ensure that customers show up for training sessions? Is there even a process?

Question 3: If at all, how do you incorporate branding in these training sessions?

Insights + Key Findings

Insight 1: Training helps end users a lot with the implementation and integration. It makes the entire cycle smoother for admins and end users.

Key Quotes

"Customers need to know about Training options and really use this as a resource." - Kristine Tegelan

1.3 Trends

Creating an initiative for some prospects is challenging. As well as keeping them engaged with the brand.

Difficult Learning

Sales over sells the product and sometimes we have a hard time bridging that gap	For a while you are on your own learning about the product
Customers think that know the product and features	Not enough documentation on how to use Work flows
Comparing to other brands - research can be confusing	Customers who do not go through training have a harder time adapting

Customers are not aware of the training options that SpringCM offers. Training helps smoothen the process and can improve the experience holistically.

Engagement

Customer support can be very slow - 4 to 5 weeks response time.	Engaging website customers beyond blogs and demos	Engage users without having them request for resources
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Usability Issues

High bounce rate - 82.26%	Forms is the only way to collect user information - this generates leads	Weak UI, but gets the job done
Requesting a demo is not the best Experience	Maximum drop-offs are from the home page	
Scroll rate is really bad	There is a lot going on the website - too much content	

The platform has several usability issues that are interrupting the flow of users.

Set-Up Longevity

Needs to be a seamless transition from marketing to product	Paid for services but had to drop it because setting up process was cumbersome	We are landing, but not expanding
Hard time scheduling a meeting with POC	Initial set-up is a nightmare	Training took time for the entire team
Implementation is extremely customer focused - training might not help	Implementation takes A LOT of time	

Customers are frustrated because the implementation takes a long time. This is because they think that the set-up process is done, but it is actually just getting started.

1.4 Mapping the Internal Journey

A journey map was developed based on all the insights collected from the internal interviews. This infographic helped generate questions for customer interviews.

This prospect journey is based on assumptions from the internal SpringCM team.

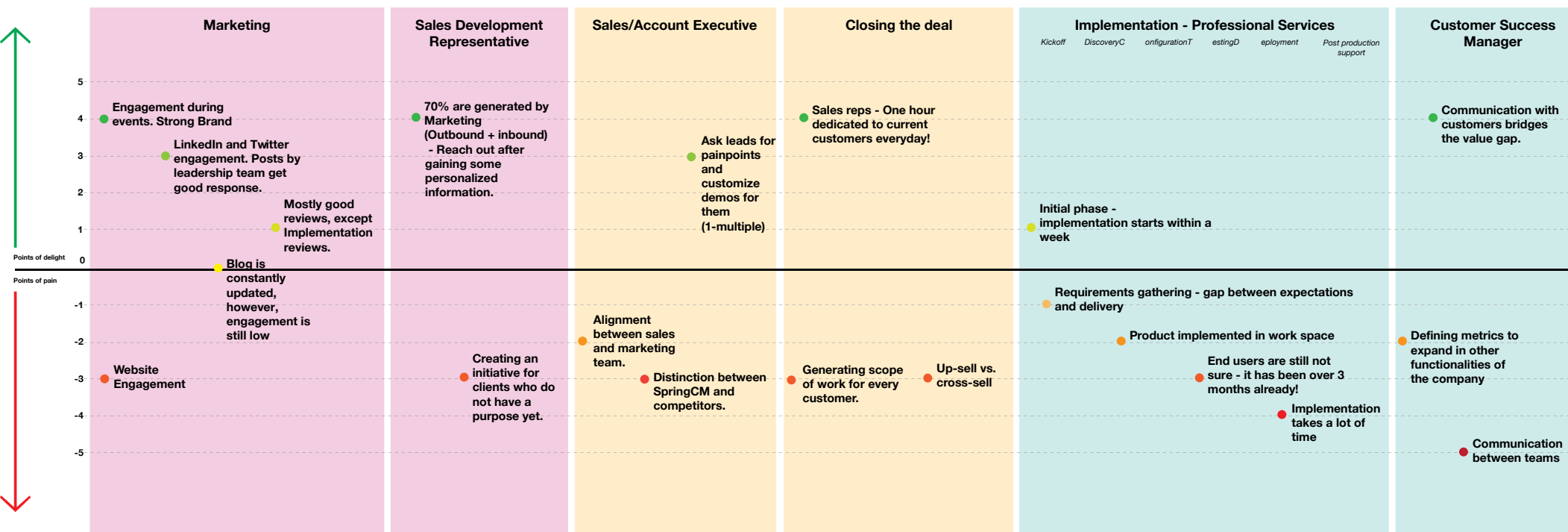
Journey Map Details

The journey map is divided into six distinct sections. Each section represents a department at SpringCM. The prospect journey starts from the marketing team (where they are first introduced to SpringCM) and ends with the customer success managers (where they have signed the contract with SpringCM and are now customers).

The map identifies the high and low points of funneling down prospects and how that is being perceived by the internal team.

It is important to identify the pain points for customers through the perspective of the internal team. This helps determine gaps for opportunities and improvements.

1.4 Mapping the Internal Journey



2.0 Website Usability

Approach

Conducting usability tests to gather insights about how non-customers perceive the brand and the value offered

Analyzing online tools such as Hotjar, Google Analytics, Hubspot.

Who did I speak to?

I spoke to individuals who fit the persona types of the brand. The process involved asking participants to complete a set of tasks related to the website. The insights were further used for mapping the prospect journey.

Target Candidates for User Tests: To avoid any form of bias, it is best to test candidates who are not directly connected to SpringCM yet. That being said, candidates who might be potential users of our products will be able to provide more insights. For example, individuals working in legal professions (i.e. staff attorney etc.), financial services, sales operations, accounts are a great fit for this research. 10 participants would be an ideal number for the testing process.

2.1 Usability Test Guide

Goal

This study will ensure that users are understanding the content, getting access to the content they need efficiently, and are being navigated to pages specific to user goals. Accessing SpringCM's website is one of the first steps customers take to engage with the company. It is imperative that this experience is efficient and effortless. This usability test will ultimately help make recommendations for the customer journey map.

Pre-task questions

Question 0.1: Have you heard about SpringCM before? If yes, how would you describe what products the company offers?

Question 0.2: Could you please describe your current document management process?

Question 0.3: What are some frustrations with document management? Or what works well?

Question 0.4: Have you ever thought about using a contract management solution? Do you see a need for it?

2.1.1 Usability Test Guide

Task Prompts

Task 1: Home Page/Content

Please scroll through the page and tell me what you see and understand about SpringCM's services? What do you feel when you look at the content? Please explain what you understand?

Task 2: Products

Let's assume that you want to implement SpringCM in your work space? How would you find out more information about that?

Can you please provide a brief explanation of what you understood about our products?

Task 3: Blogs and Resources

Let's assume that you want to know more about the recent updates at SpringCM, how would you go about this?

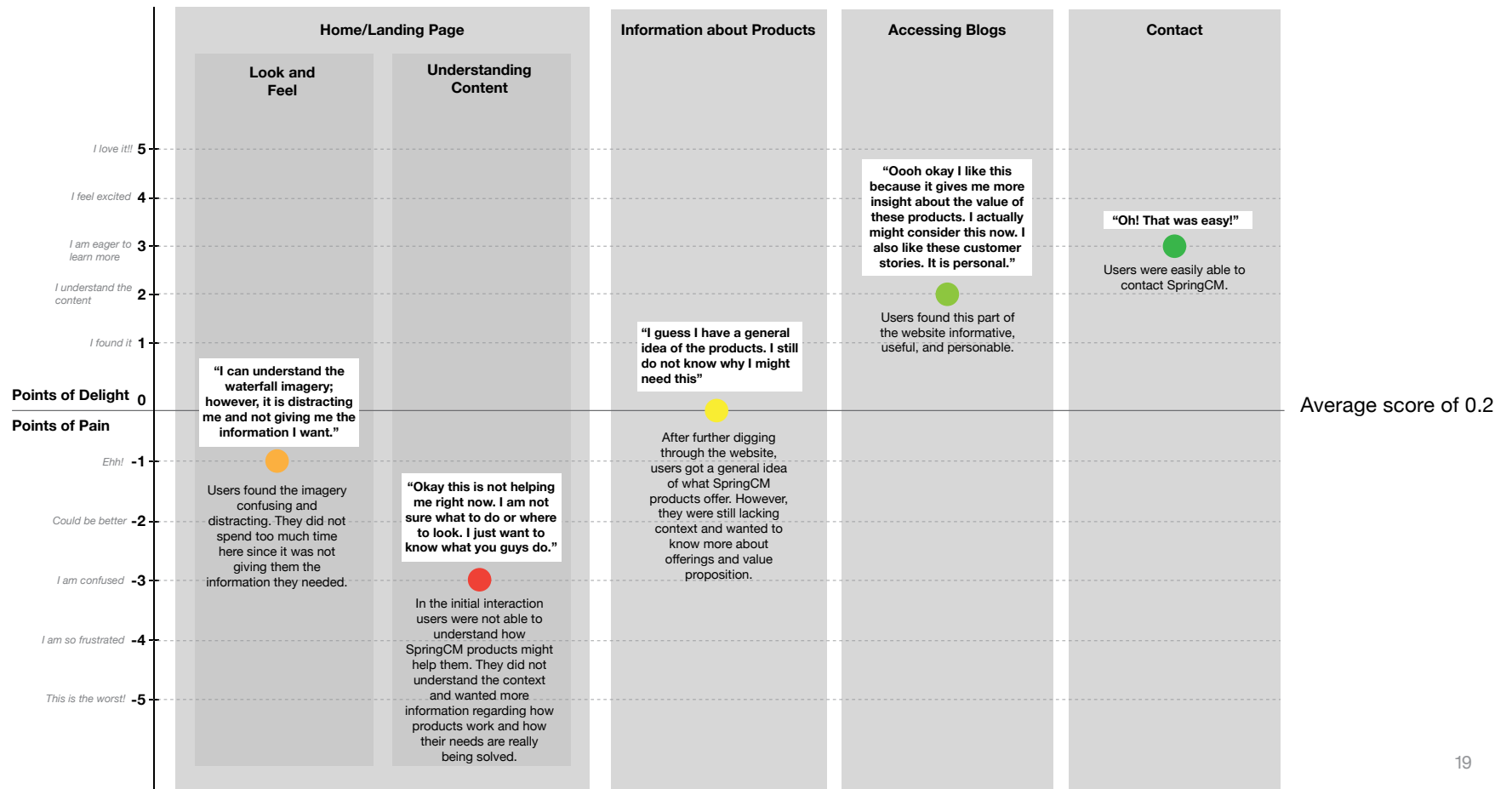
Task 4: Contact

Let's assume that you have gathered all the information you need and want to contact SpringCM to know more about their products. How would you go about completing this task?

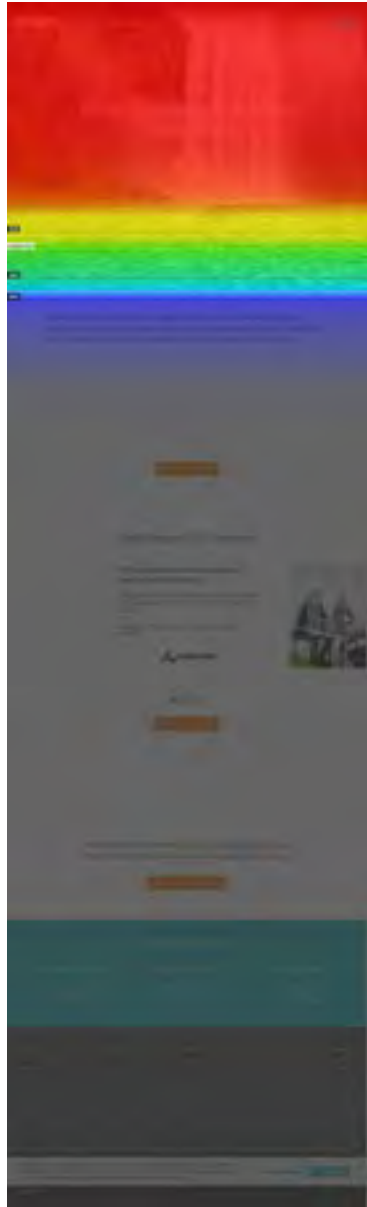
2.1.2 Usability Test Synthesis

Analysis

The participants were asked to complete tasks and based on their responses, I mapped out their usability journey on this map. I averaged out the scores and plotted the final journey.



2.2 Analytics

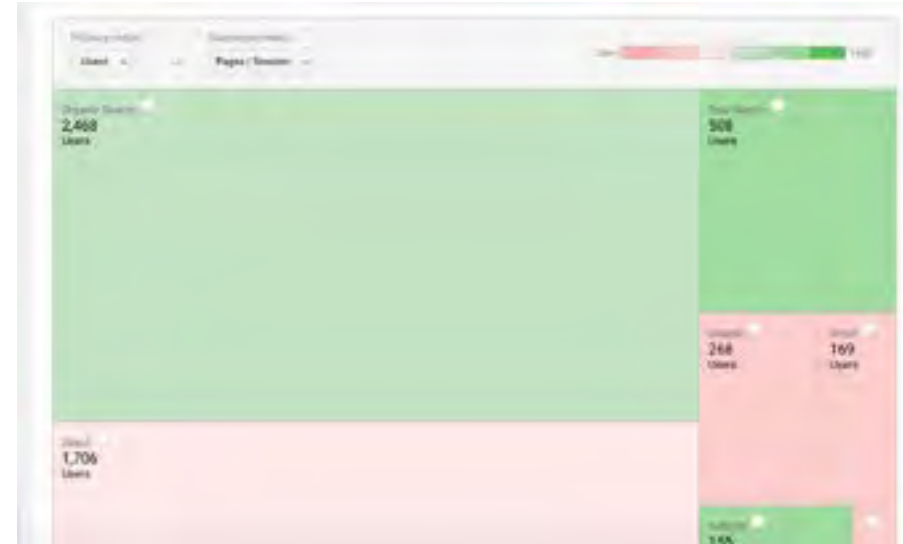


Low scroll rate

This is a snapshot from Hotjar indicating a low scroll rate. Visitors were not going past the initial frame.

Users are not able to get valid information and tend to miss out on product offerings and information.

Since, the engagement is fairly low, the score is -3



Default Channel Grouping	Acquisition		Behavior			Engagement	
	Users	New Users	Bounces	Bounce Rate	Pages / Session	Avg. Session Duration	Conversions (Goal 1 Completions)
Total	5,320	4,120	7,155	52.48%	1.79	00:01:43	0
1 Organic Search	2,468	1,854	3,295	52.86%	2.80	00:02:03	0
2 Direct	1,706	1,379	2,316	50.20%	1.52	00:01:32	0
3 Referral	508	342	440	41.75%	2.22	00:02:05	0
4 Display	268	215	487	64.79%	1.27	00:00:24	0
5 Email	169	75	228	51.95%	1.39	00:01:32	0
6 Referral	150	119	182	57.92%	2.27	00:01:44	0
7 Social	160	51	199	45.14%	1.88	00:01:47	0
8 Other	75	49	105	62.22%	1.24	00:00:27	0

Maximum traffic coming from organic search

Users are reaching the website through organic research. Having a good search engine optimization (SEO) is important.

Include meta tags for all pages.

2.2 Analytics



High drop-off rate

Customers were not spending too much time on the website as they were visiting to just log into SpringCM (products).

Since, SpringCM is a different domain all together, users were being taken off the website and directed to SpringCM login.

This is a known factor and was not considered as a deciding point.

Score: 0

3.0 Customer Research

Approach

Talking to customers and gathering first hand information was particularly insightful.

Who did I speak to?

The goal was to speak to customers who are recently experienced the on-boarding process. Since, the scope of the project is focused on the prospect journey, I wanted to interview customers who are fresh to SpringCM and are going through it now. This resulted in raw and truthful statements.



This empathy map indicates the different actions and emotions of the customer. This enables us to get more insight into what the customer needs might be. We can see all the entities that influence a customers' decisions.

3.1 Interview guide for SpringCM customers

Goal

The goal of this research is to gather emotional and behavioral patterns of SpringCM customers.

Key Questions

Question 3.1: How would you describe your role and what does your day look like?

Question 3.2: How did you hear about SpringCM solutions?

Question 3.3: How were you managing contracts/documents before you started using SpringCM products? How did this change after SpringCM?

Question 3.4: How did you describe your on-boarding process?

Question 3.5: How long did it take to completely implement SpringCM products?

Question 3.6: How often did you keep in touch with our representatives during the sale cycle.

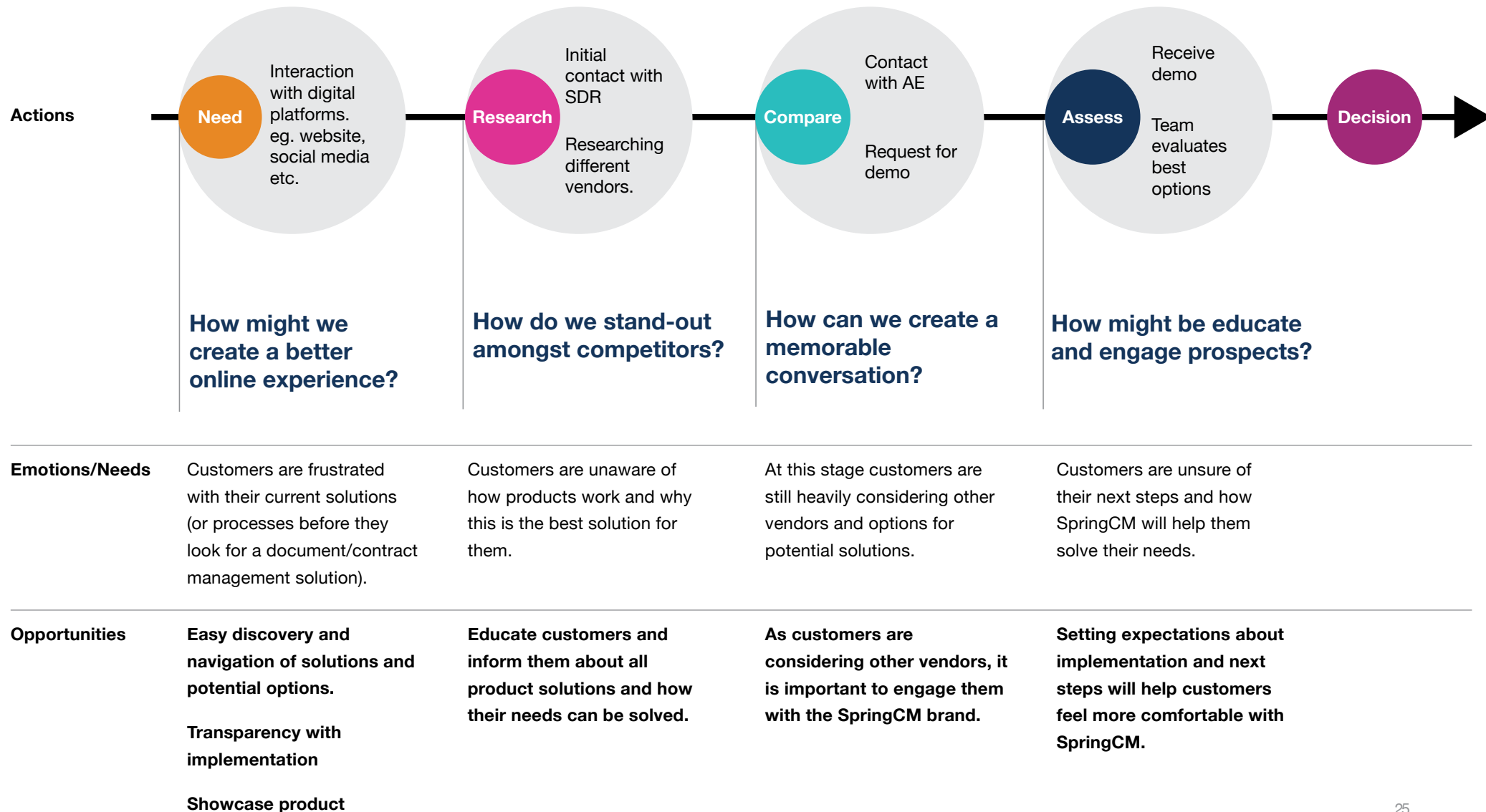
Question 3.7: Can you please give examples of some challenges that you faced during sales process?

Question 3.8: Are there any aspects that frustrated you about the on-boarding journey?

Question 3.9: Was there anything you particularly liked about your initial interaction with SpringCM?

3.2 Customer Actions

What are customers really doing?



3.3 Key Insights

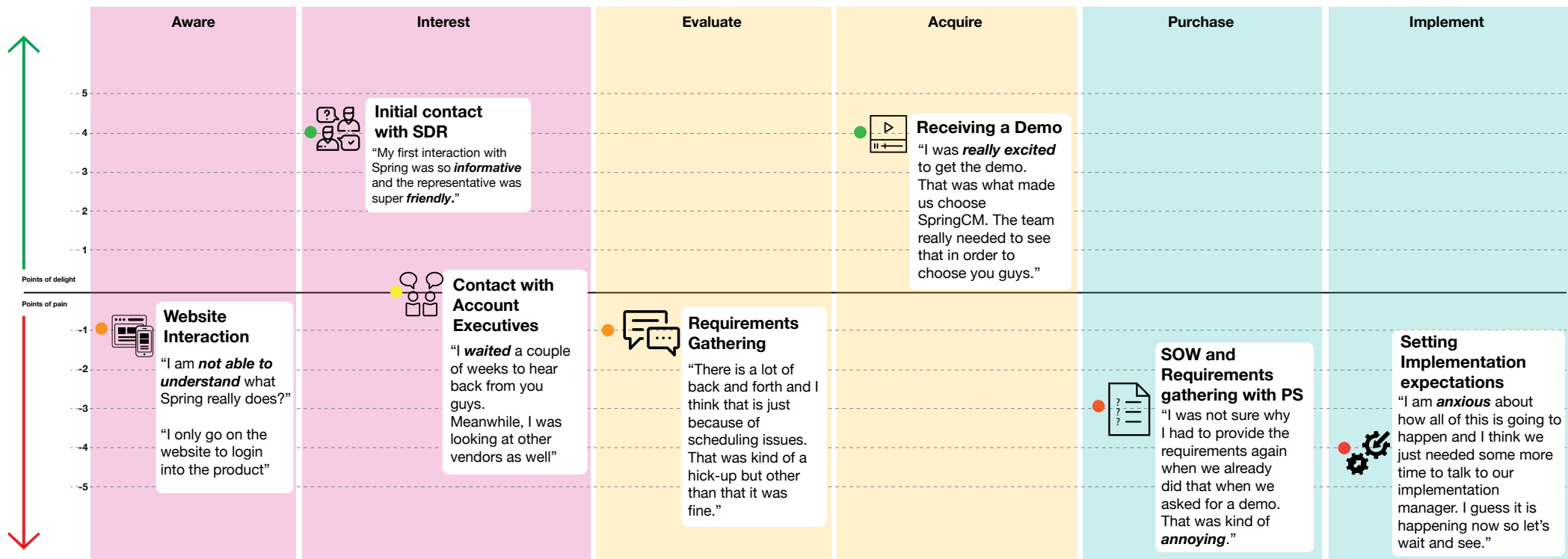
Findings

A few trends emerged after conducting customer interviews. The following are high level descriptions of trends. The rest of the report elaborates the qualitative data that was collected.

Trends

- The initial contact with SpringCM is “amazing!”
- Customers felt heard when talking about their needs.
- Customers were delighted about receiving demos that are tailored to their needs.
- Customers waited for up to 4 weeks to receive a demo.
- There is a lot of back and forth between customer and POC when gathering requirements.
- Implementation is difficult.

3.4 The Journey



Score breakdown below.

Score Breakdown

Website Interaction

I took the average scores assigned from the usability tests, Hotjar analytics, Hubspot, Google Analytics and customer interviews and came up with a score of -2 for website interaction.

Scores

- Usability tests: [0.2](#)
- Hotjar: [-3](#)
- Hubspot: 0
- Google analytics: 0
- Customer interviews: -2 (customers were not exploring the website as an education tool)

AVERAGE SCORE: approx. -1

Interaction with SDR

Trigger words - “informative,” “helpful,” “learned,” “friendly,” “prompt”

AVERAGE SCORE: approx. 4

Contact with Account Executives

Trigger words - “waited for a while,” “was not sure about...”
“Debating between SpringCM and _____”

AVERAGE SCORE: approx. 0

Requirements Gathering

Trigger words - “scheduling issues,” “wanted to know more about...” “hick-up”

AVERAGE SCORE: approx. -1

Receiving a Demo

Trigger words - “loved it,” “deciding factor,” “helpful,” “felt excited”

AVERAGE SCORE: approx. 4

SOW + Requirements Gathering

Trigger words - “annoying,” “frustrating,” “did not know what was happening”

AVERAGE SCORE: approx. -3

Setting Implementation Expectations

Trigger words - “anxious,” “I had no clue,” “confused”

AVERAGE SCORE: approx. -4

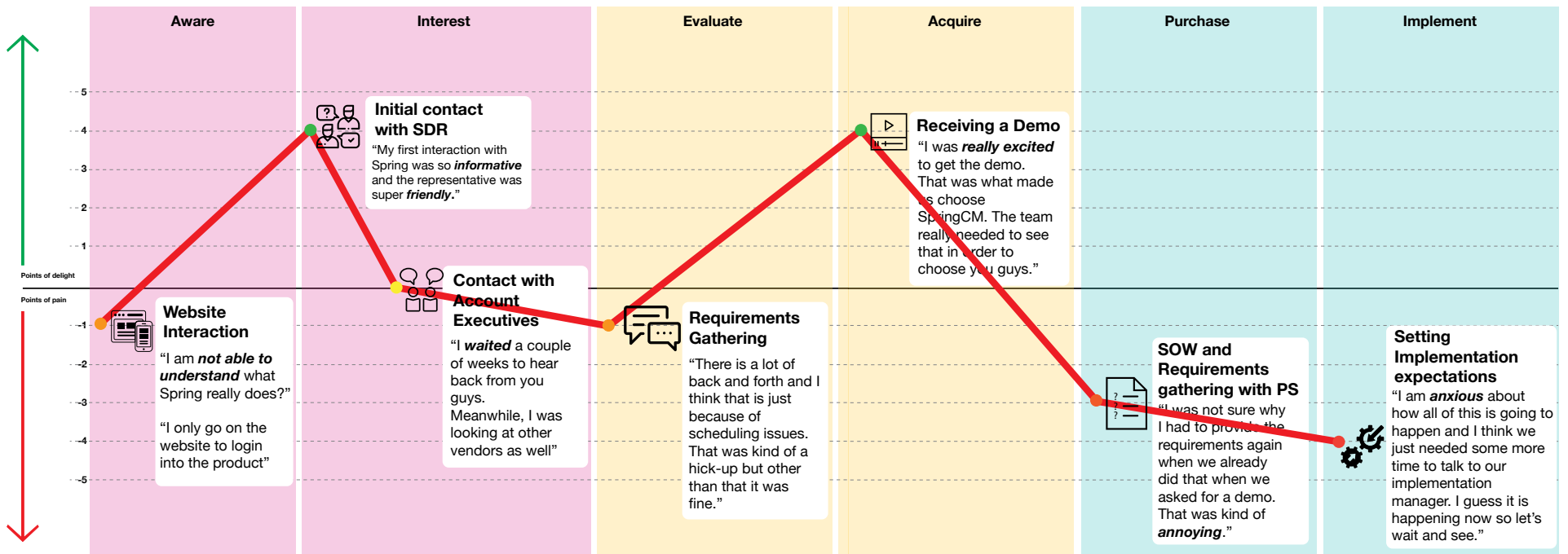
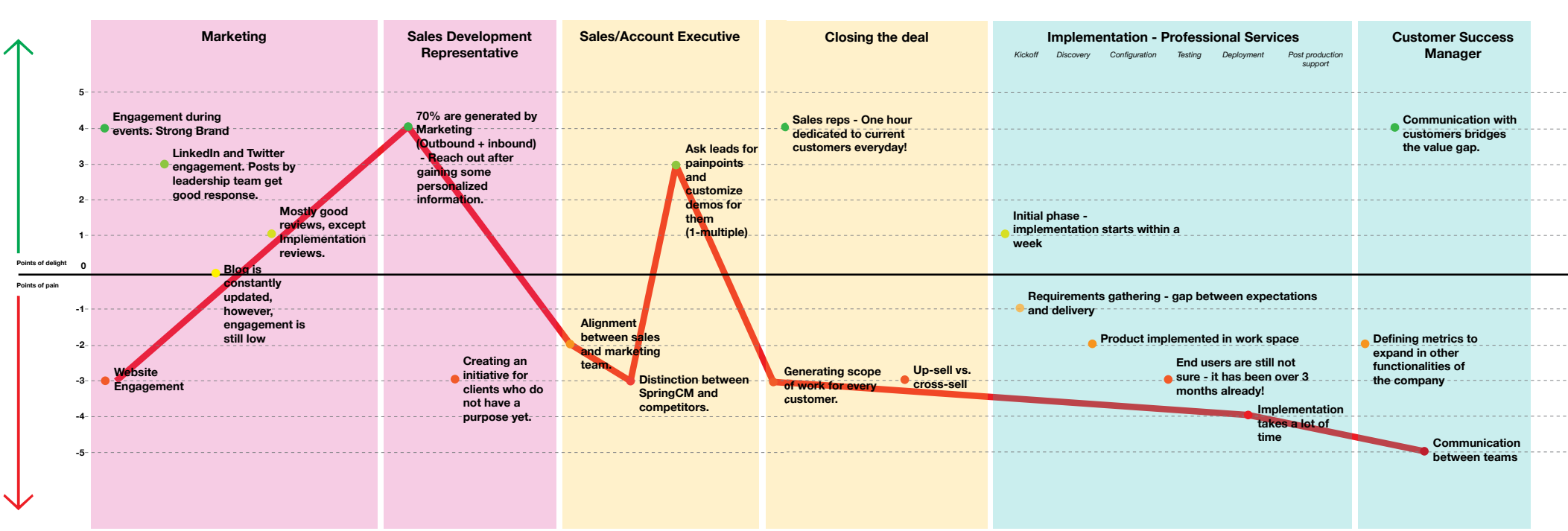
4.0 Hypothesis

The Trend Line

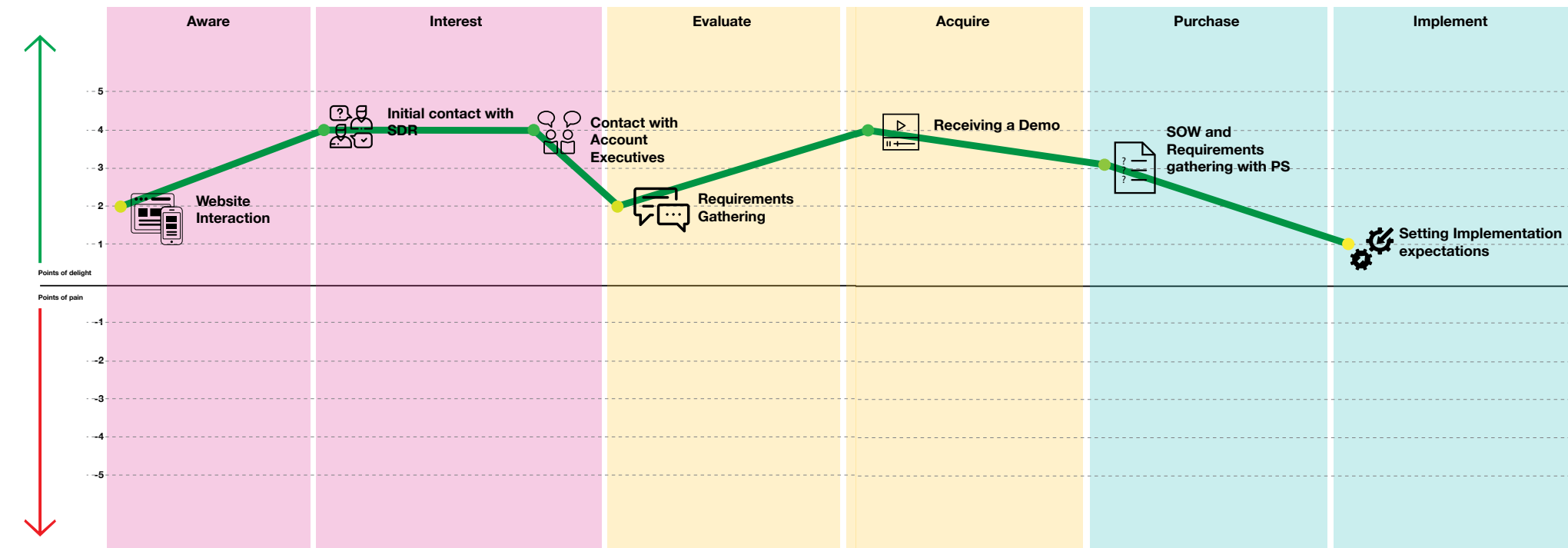
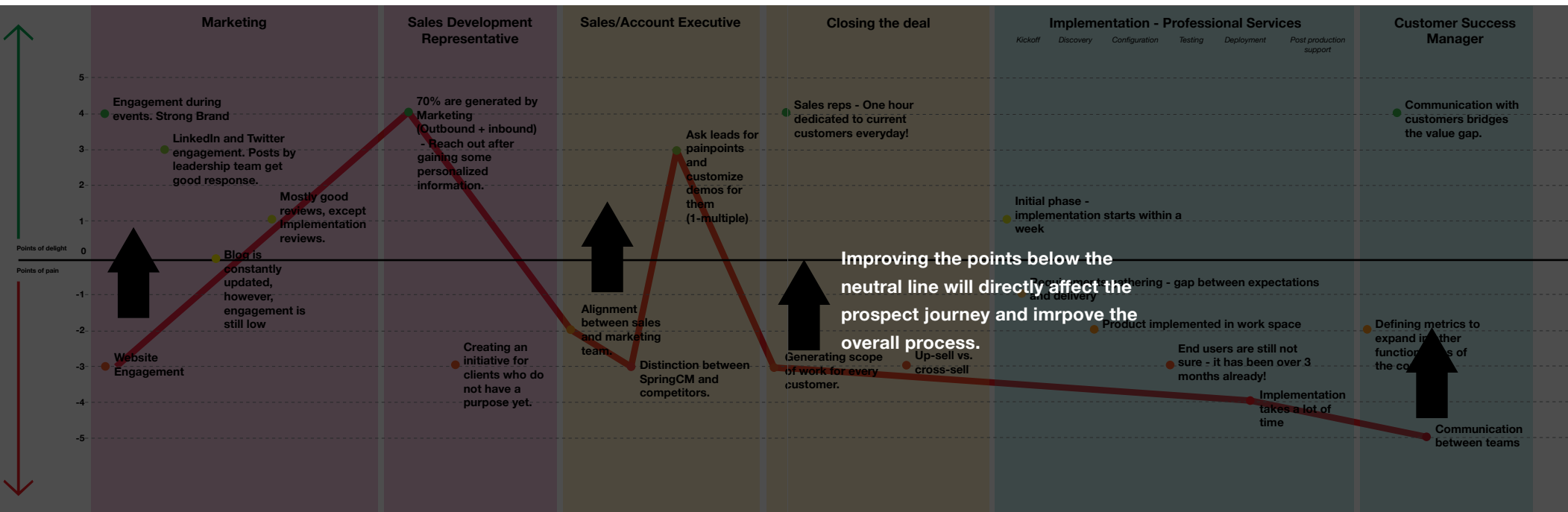
After conducting this research, I started exploring an overarching theme. I examined the internal journey (previously plotted) and the prospect journey. I noticed a very unique trend line.

Hypothesis

If we elevate the internal process, it should project on the externally and improve the overall prospect/customer journey.



The trend line was plotted based on the touch points of the prospect corresponding with the touch points in the internal journey. The processes in the company were directly projecting on the prospect journey; suggesting that if we improve the internal processes, it improve the prospect journey.



5.0 Opportunity

Suggestions and Recommendations

Opportunities were identified after conducting and analyzing the research. The concepts are mainly centered around elevating the prospect experience as a whole and implementing small changes in the sales cycle.

Some aspects that were kept into consideration were brand and product technicalities and complexities.

Brand

One of the main questions throughout the research process was “how does the brand show up in the different stages of the sales cycle? Keeping this key aspect in mind, the research was centered around brand identity and personality.

Product

Since, the product’s offerings are so complex, there were some aspects that were over-looked and classified as growing pains. For example, sometimes it can weeks for customers to provide requirements and for SpringCM to completely comprehend these requirements. This delay could be because of scheduling purposes and really understanding the needs of the customers.

5.1 Idea Mining + Brainstorm



After gathering all insights, I conducted a brainstorming session to discuss some themes that were prominent throughout the internal team research phase.

Brainstorm Prompts

How to enable better communication between teams?

How to stand-out amongst competition?

5.2 The Digital Experience

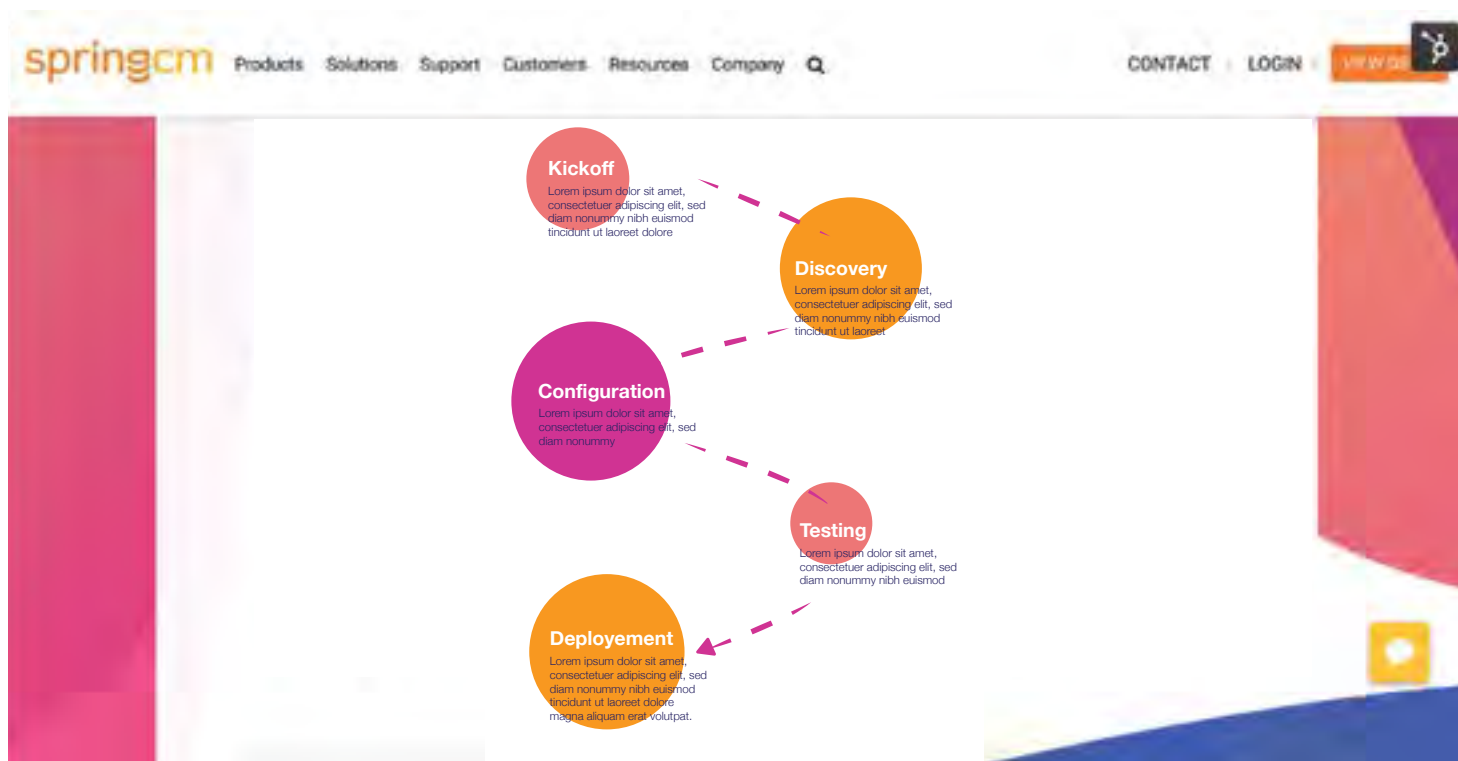
Website Usability

After analyzing website statistics and data, I realized that the visitors were not really interacting with the website and were just there to get access to SpringCM products. Conducting some usability tests to improve the digital experience would be a positive change since the website is a primary touch point for prospects.

Opportunities

Leveraging the website as an education and information tool.

Showcasing Implementation on the website



The implementation cycle has a different timeline for customers; however the process and steps taken are similar for all customers. Showcasing this process on the website will not only be informative for the prospects; but also creates a sense of transparency and trust with the SpringCM brand.

5.3 Opportunity Campaign

Keeping Prospects Engaged

Prospects are doing multiple things when narrowing down on a vendor. By providing them with resources along their sales journey; we can ensure that prospects are engaged with the brand.

Emails

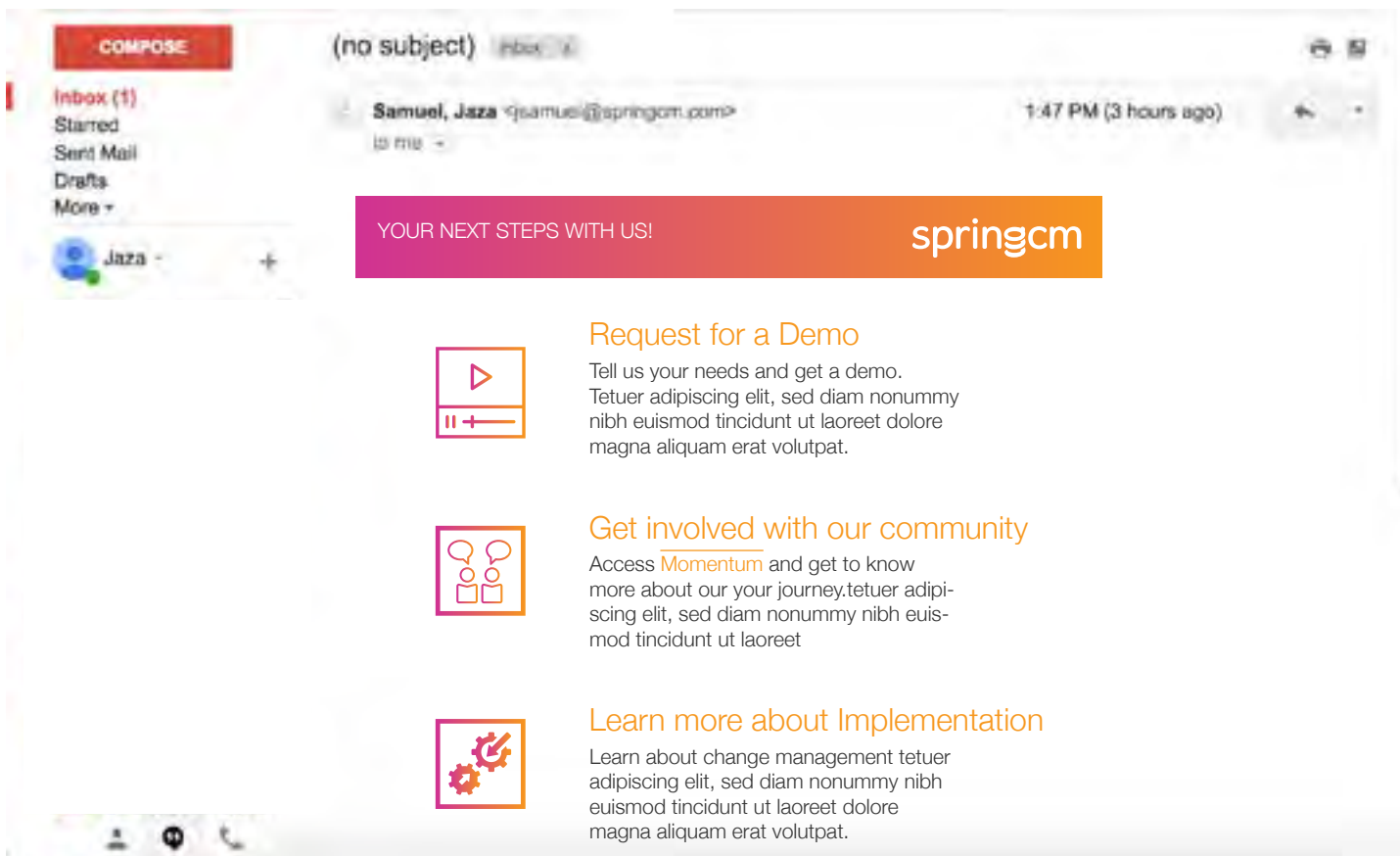
Provide prospects with customer success stories through email. Generate a few stories based on different use cases; this way we can cater to prospects with similar needs as well. To personalize the experience, these resources should be sent by the POC here at SpringCM.

Implementation Expectations

Customers (especially sales and legal personas) are aware that the implementation process takes time; however, they do not know the extent of it. To make this expectation clear for customers is important. Customers are excited after purchasing the product; however, they do not realize that the real process starts after the signature.



SpringCM POC needs to set this expectation and build-up to this point in the journey, just so that this is not a surprise for the customer.

Sharing Resources



Sending an email after the initial call with Sales Development Representatives can be a helpful resource for prospects. This email will highlight their next steps and give prospects access to blogs, discussion forums etc.

Sharing Customer Success Stories



Customer Name Know more about our customer success stories and how SpringCM aided a better document management process.

Company Name
Brief discription about customer and what the company does. Also, what functionality we are working with? dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Customer Needs and Expectations
Requirements set by customers. pcommodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint

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The Challenge
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View other resouces that may be helpful to you

- Momentum
- Blogs
- Social Media

Sharing customer success stories can help prospects feel most comfortable with their decision making process. These stories will highlight needs similar to the ones of the prospects.

5.4 Using Spring for SpringCM

Templatize SOW

To ensure that customers are not waiting for a long time to receive their statement of work; Account Executives can have a template of the SOW that they alter for different use cases. This can not only, speed up the sales process, but also further streamline the internal process.

6.0 Retrospective

Project Overview

The project scope was to create a prospect journey map that gathers the emotions and experiences from when a person becomes aware of SpringCM to the point where they become a customer.

Goals and Process

The process included speaking to different stakeholders who participate in the prospect journey. This included speaking for the internal team, the current customers, and individuals who fit the persona type. All the insights gathered from these interviews contributed to generating the prospect journey map. The end result was identifying opportunities for improvement.

Lessons Learned

The biggest takeaways revolved around communication and improving the [internal process](#).

Communication - During the research, I soon learned that there was a lack communication between teams. Sharing and learning from individuals in each team would benefit with not only gaining more knowledge, but also having new aspects to offer to prospects and customers. This new knowledge could contribute to an initial conversation (SDR's) and also keep customers engaged with the brand and company developments (CSM's).

The internal process projects externally and affects the prospect/customer journey - The biggest learning through this entire process was discovering how the internal, company process, directly correlates with the external customer journey. The highlights and lowlights in the process are directly affecting the points of delight and points of pain on the prospect journey. Improving and alternating the business processes will improve the overall customer experience.