



ITERABLE

Lifecycle Mapping

PERSONALIZATION PLAYBOOK

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You're reading the second part of Iterable's [Pillars of Personalization Series](#), which is going to cover four topics every growth marketer needs to understand to create messaging that is empathetic and relevant to customers.

Whether your brand uses storyboards, the design thinking process or intuition to build out your brand's customer lifecycle map, there lies a fundamental problem with each of these methods.



Historically, people have built brand-centric journeys rather than customer-centric journeys.

- Garin Hobbs, Director of Deal Strategy, Iterable

In other words, the customer lifecycle mapping process is only valuable to your marketing and sales teams. After all, no customer ever thinks to themselves that they're in the "awareness" stage of a brand-centric journey.

So how do you break out of this thinking pattern and build a customer journey that engages and retains your customers for life?

That's why for the second part of the *Pillars of Personalization* series, we're going to discuss all things related to **lifecycle mapping**.

Once you read this guide, you'll learn:

The difference between a lifecycle map and a journey map

The four steps to creating a customer journey

How to integrate the customer journey with your lifecycle map

LET'S GET STARTED.

The Difference Between a Lifecycle Map and a Journey Map

According to the [Interaction Design Foundation](#), a customer journey map details how a customer and a brand will interact with each other over the course of a lifetime.

Contrast that with a [customer lifecycle map](#), which is a visual representation of how a customer starts and ends their relationship with a brand.

Though the terms seem identical, [customer experience thought leader Annette Franz](#) states that the nuance is important, because a customer journey map gives brands:

A way to walk in your customer's shoes and chart [their] course as [they] interact with your organization (channels, departments, touchpoints, products, etc.) while trying to fulfill some need or do some job within each stage of the lifecycle.

Both maps are necessary for marketing and sales teams to have. But the difference between the two of them is in perspective.

A customer lifecycle map focuses on the internal buying behaviors of the brand for purposes of categorizing and segmenting customers, whereas the customer journey map exists to help marketers understand how their brands and products fit into a customer's life.

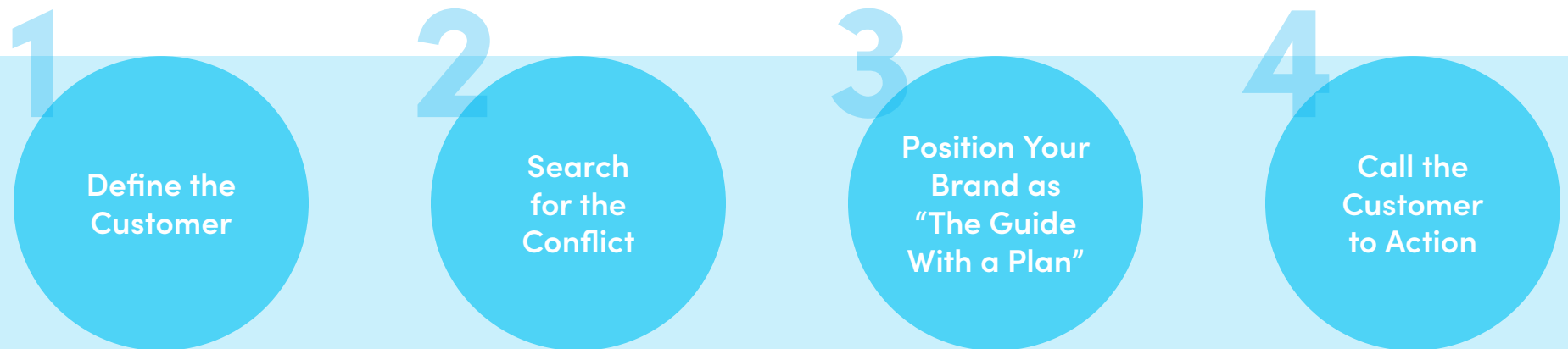
In other words, it's the same idea that encourages CEO Jeff Bezos to always [leave an empty chair in meetings at Amazon](#).

Now that we understand the difference between these two similar maps, let's talk through how to go about creating a customer journey map to complement your lifecycle map.

The Four Steps to Creating a Customer Journey

While marketers can certainly rely on tried-and-true customer research methods like personas or Jobs-to-Be-Done to create their customer map, another method you can use adapts [Donald Miller's framework](#) from his best-selling book, *Building a StoryBrand*.

The framework contains four steps, which include:



To make it easy for you to follow along, we'll be using the persona of a 30-year-old female customer considering purchase of a fitness subscription service from Fiit, an Iterable customer. Let's call her Alli.

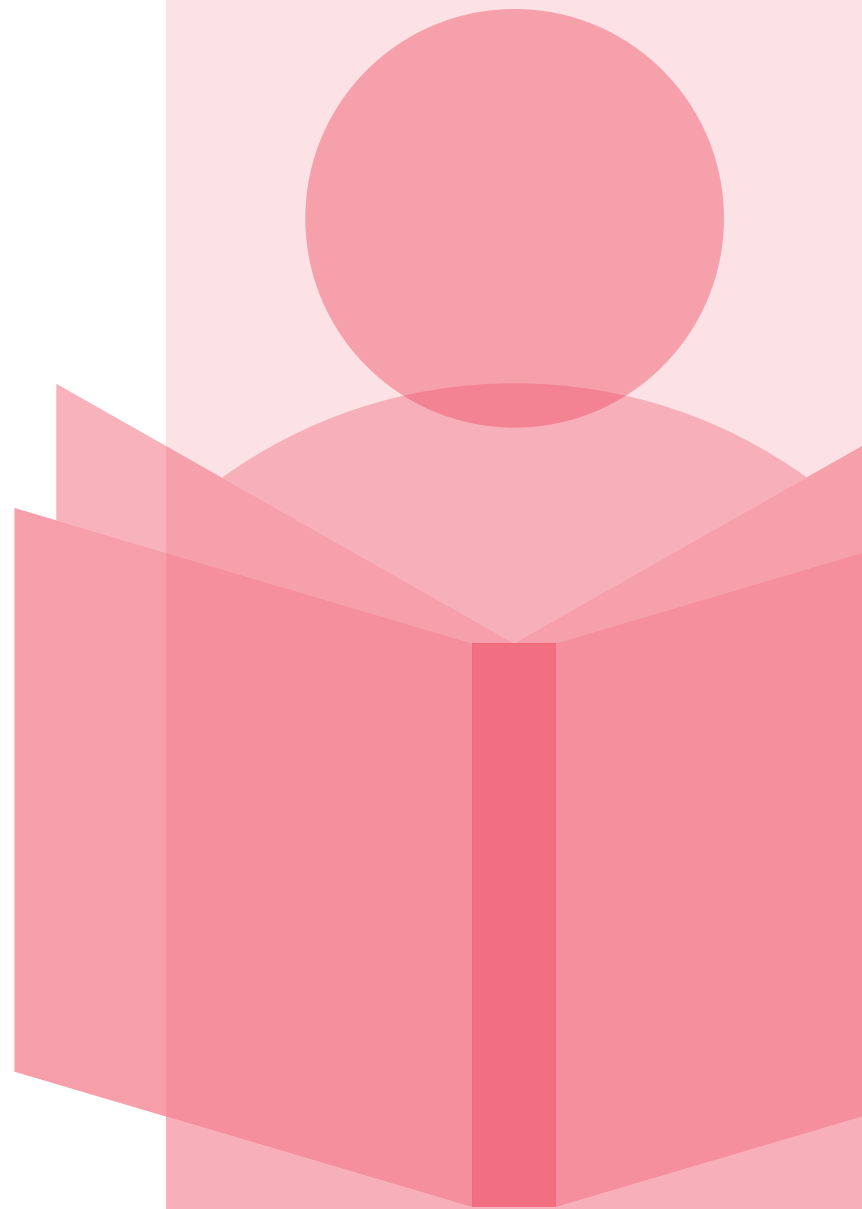
STEP 1

Define the Customer

To start the process of building a customer journey map, determine who it is that you're trying to reach.

While it's tempting to focus on [user segments like gender, lifecycle stage or the last time they visited your website](#), now is the time to build out an individual customer profile, using exercises like [persona building](#) or our [four steps to building your brand's perfect audience](#) to guide you through the process.

Once you've determined who that individual customer is, then you can use it to build a story around their current wants and desires, as it relates to your brand's products or services.





So in the case of Alli, our 30-year-old female customer, she has no issue with paying for a boutique gym membership, as she likes the variety of group workouts they offer. However, she's been missing the routine of going to the gym and working out with others since the COVID-19 pandemic began.

What we described above is what author Donald Miller refers to as a **story gap**, which is an unanswered question or desire that a brand can fulfill for the individual customer. He states that story gaps are important because:

When we don't open a story gap in our customers' minds, they have no motivation to engage us because there is no question that demands resolution. Defining something our customer wants and featuring it in [your brand's] marketing materials will open a gap.

Of course, what your individual customer desires may be different from our example. However, here are a [few broad themes Miller suggests starting with](#):



More money



More status



More time



More resources to survive



More friends & acquaintances



More desire to be charitable



More meaning

Search for the Conflict

The second step of building a customer journey map is to search for the conflict that your individual customer currently faces. This shouldn't be too difficult, as you probably already have some general idea of what problems your products and services solve for your brand's customers.

However, you may not be viewing the problem from the eyes of the customer. This is why Donald Miller emphasizes the need to break down the problem your customer faces by answering the following questions:

1. Who is the villain?

As in, what "thing" does your product or service prevail over?

2. What problems do they face?

These problems could be:

- **External**, which are physical barriers to reaching a solution to the problem
- **Internal**, which focus on self-limiting beliefs of the character
- **Philosophical**, which are about ideals or a "perfect world"

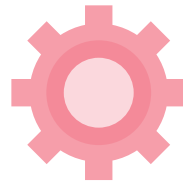


So for Alli, the villain is the lack of exercise routine. Here's how we would list out her problems:



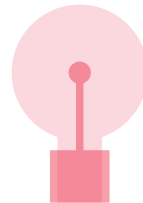
External

Could be the social quarantine policies that prevent her from going to the gym



Internal

Could be the fear of losing motivation to workout regularly



Philosophical

Could be that her fitness goals are achieved quicker if she works out alongside others

By defining the conflict using external, internal, and philosophical factors, you as a marketer will get clearer as to how and why your customers purchase your brand's products or services.

Position Your Brand as “The Guide With a Plan”

The third step of building a customer journey map is to position your brand as a guide, and the customer you defined above as the hero.

According to Donald Miller, this is because:

The guide must have this precise one-two punch of empathy and authority in order to move the hero and the story along.

These are the characteristics the hero is looking for, and when [they] sense them, [they] know [they've] found [their] guide.

In other words, being the guide positions your brand as the expert who's helped hundreds of other people like the customer with their products and services.





Not only is it important to position your brand as someone who's experienced the customer's problems before, Miller also states the importance of your brand giving customers a "plan" to successfully navigate the problem.

For B2C brands in particular, this plan is how the product is purchased and received by the customer.

So in the case of Alli, who's trying to find safe alternatives to going to the gym, she notices that the homepage of fitness app Fiit.tv includes a list of Frequently Asked Questions (FAQs) that lists the types of classes they have on their app.

In addition to on-demand classes, for those who miss the camaraderie of working out with others, Fitt also has 60 group workouts with live leaderboards scheduled every day, and the ability to create private classes with friends.

STEP 4

Call the Customer to Action

The fourth and final step of building a customer journey map is calling the customer to action. However, marketers like you know that it's not as simple as your customer hitting the Add to Cart button and checking out without any issues whatsoever. There are many things that can prevent a customer from making a purchase.

Miller states that there are two kinds of questions customers commonly ask themselves before making a purchase from a brand:

1. What's the alternative?

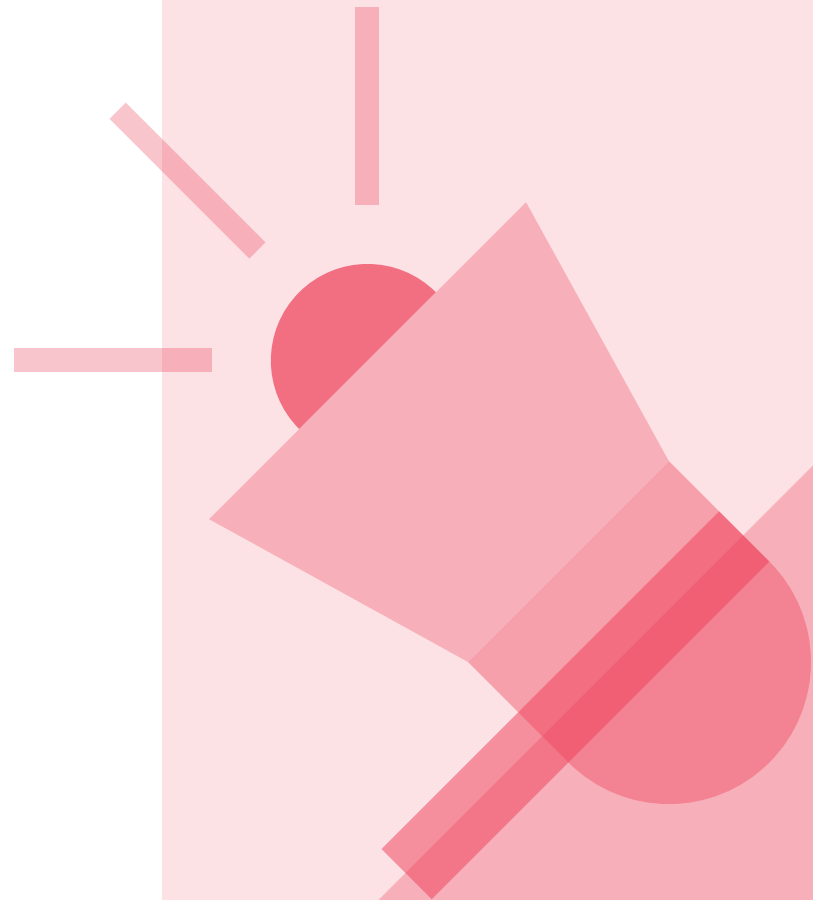
As in, what does the customer miss out on if they don't buy?

2. Who do I become as a result?

As in, how is my life going to change for the better if I buy?

That could look like:

- **A status bump**
- **Character completeness**
- **Reaching full potential**





How your brand answers these questions for your customers depends.

But generally, all of these elements can be addressed implicitly or explicitly in product pages, checkout pages, and marketing messages like [onboarding emails](#), [direct mail offers](#), or [in-app notifications](#).







So for Alli, if she makes the decision to join Fiit, she may realize that she can simulate the same feeling of attending a group workout at her boutique gym with any of her friends and family, from the comfort of her own home.

Now that you know the four steps to building out a customer journey map, let's talk about how to integrate your findings with your brand's customer lifecycle map.

How to Integrate the Customer Journey With Your Brand's Lifecycle Map

If you've followed the process, you should have a greater understanding of who your customers are, what they want, and how your brand fits into their transformation to attain their desires. But now how do you go about integrating it with your customer lifecycle map?

While the specifics of every brand's customer lifecycle varies, [Kim Kosaka from Alexa](#), Amazon's SEO and Competitive Analysis tool, shares a general framework that includes the following steps:

-  Awareness
-  Engagement
-  Evaluation
-  Purchase
-  Post-Purchase
-  Advocacy

Once you've identified your brand's existing customer lifecycle, make notes to your customer journey map to see how the lifecycle steps fit into their path of discovering your products and services.

So for example, Alli is considering whether she should try a free trial of Fiit. While she's making her decision, she may also be trying other fitness subscription apps, working with a personal trainer over Zoom, or scheduling socially distanced outdoor workouts with friends.

From Fiit's perspective, doing the customer journey map exercise could help them make the decision to personalize a marketing campaign specifically tailored around live virtual group fitness classes.

To learn how Fiit.tv, a U.K.-based subscription fitness app re-mapped out their customer journey using Iterable, check out our case study on the next page.

Putting Lifecycle Mapping to the Test

Fiit.tv provides on-demand classes, group workouts and tailored training plans to support every stage of the fitness journey.

While Fiit had seen healthy year-over-year (YoY) growth, nothing could have prepared the business for the massive influx of new users trading in-person workouts for virtual, resulting in 300% YoY growth in 2020.

To effectively capitalize on their expanded addressable market and deliver an experience that would retain those users for the long haul, the Fiit team used Iterable to test their onboarding sequence across email and mobile push notifications to optimize for conversions and retention.

Leveraging Iterable's cross-channel Experiments and Workflow Studio, Fiit tested both content and timing of touchpoints to determine what drove users to complete their first class within the first five days, and ultimately provide the highest trial-to-paid conversion performance.

After testing, Fiit increased conversions from new user onboarding by 15% and first-day activations by 12%.

15%

increase in trial-to-paid conversions from new user onboarding

12%

increase in first-day activations

An optimized onboarding experience to capitalize on an astounding year of growth

Now, a Recap on Lifecycle Mapping

Marketers may have taken the time to map out the customer lifecycle, but chances are brands have yet to explore another perspective: The journey, in the eyes of the customer.

To create a customer journey map, we at Iterable recommend an adaptation of Donald Miller's framework from his best-selling book, [Building a StoryBrand](#).

The four steps are:

1. Define the character
2. Search for the conflict
3. Position your brand as "the guide with a plan"
4. Call the customer to action


Then, you can integrate your findings with your brand's current customer lifecycle and see if there are any gaps in messaging you may have missed.


Now that you have a better understanding of how to break out of the traditional thinking patterns of lifecycle mapping, what are you going to do to capture the hearts and minds of your customers?

Ready to build a customer journey that engages and retains your customers for life? Use our workbook on the next page to evaluate how your current lifecycle map supports your marketing goals today.


Lifecycle Mapping Workbook

 **Customer**

 **Discovery:** How does the customer discover you?


 **Brand**


 **Conflict**


 **Education:** What education do they need to feel comfortable making a purchase?


Plan or process for customer to succeed

 **What happens if they fail?**

 **Purchase:** What does the purchasing process look like?

 **What happens when they succeed?**

 **Post-Purchase Engagement:** How will we know their life changed as a result of our products and services?

 **Advocacy:** How do we continue the relationship?

About Iterable

Iterable is the growth marketing platform that enables brands to create, execute and optimize cross-channel campaigns with unparalleled data flexibility. Leading brands, like Zillow, SeatGeek and Box, choose Iterable to power world-class customer engagement throughout the entire lifecycle.



Data Flexibility at Your Fingertips

Access real-time user, behavioral and event data to trigger personalized messaging at virtually unlimited scale. Support an audience of millions while appealing to each subscriber's unique preferences.



Unified Brand Experience

Orchestrate seamless customer engagement across email, mobile push, SMS, in-app, web push, direct mail and more throughout every lifecycle stage, from activation to re-engagement.



Agile Iteration & Optimization

Launch, measure and fine-tune campaigns with ease to deliver more relevant messaging faster than the competition. Experiment and iterate on-demand to determine the right content, channel and cadence for each user.



Customer Journey Mapping

Visualize the entire customer journey and build sophisticated, cross-channel segments and campaigns with Iterable's intuitive, drag-and-drop Workflow Studio.

If you want to learn more about Iterable, please request a demo.

[Request Demo](#)

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