

Heart & Hustle Blueprint

Customer Journey Planner

Create an experience your customers will remember.

PAGE 1 - Design Your Customer Experience

How do I want customers to feel First contact?

How do I want customers to feel After they hire me?

How do I want customers to feel After the project is complete?

Customer Journey Checklist

- First Contact
- Discovery Call / Estimate
- Appointment Scheduled
- Confirmation Sent
- Service Delivered
- Invoice Sent
- Follow-Up
- Request a Review
- Stay Connected

Reminder: Great customer experiences are built intentionally.

PAGE 2 - My Customer Workflow

Step	What Happens?	Template?
Inquiry		■
Estimate		■
Booking		■
Appointment Reminder		■
Service Day		■
Follow-Up		■
Review Request		■

Repeating tasks I could simplify:

Can this become a template? ■ Yes ■ No

PAGE 3 - My Scheduling System

■ Google Calendar

■ Outlook

■ Paper Planner

■ CRM

■ Other _____

Every appointment includes:

■ Travel Time

■ Setup Time

■ Appointment

■ Wrap-Up

■ Follow-Up Reminder

■ Buffer Time

Where do I usually lose time?

PAGE 4 - Weekly Systems Review

■ Every customer received the same experience

■ What caused stress?

■ What could become a checklist?

■ What could become a template?

■ What can I automate?

■ What should I stop doing?

My One Improvement This Week

Heart & Hustle Principle

A great business isn't built by working harder every week.

It's built by making each week run a little smoother than the last.

— Stephanie Sherouse