



Customer Journey Analysis

Build & test custom, personalized, cross-channel communications to facilitate pathway to purchase

The **Agenda**

01 Objectives and Methodology

02 Research and Discovery

- Platform Analysis
- Competitor Analysis
- Customer Perspective

03 Our Recommendations

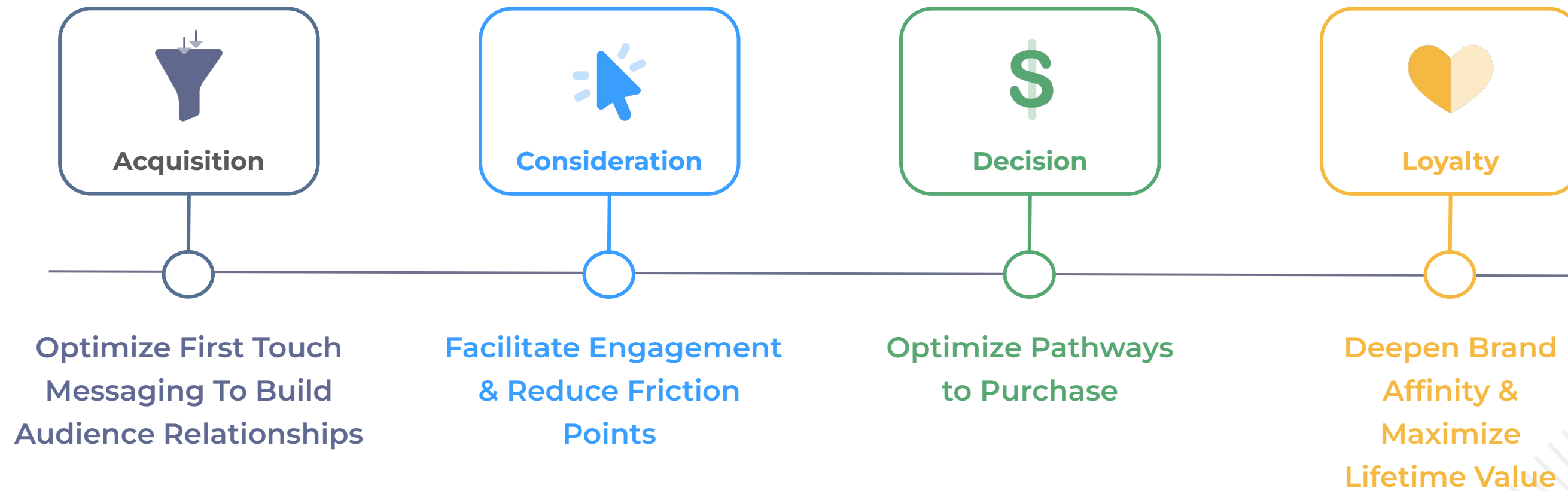
- Awareness
- Consideration
- Decision

Objectives and Methodology

Customer Journey Objectives

1. Outline the most common customer lifecycle journeys from awareness to decision;
2. Identify at what points in the lifecycle journey customers and prospects exit;
3. Gain sufficient understanding of the comparative value of customers across primary acquisition sources; and
4. Identify if stages of Client's lifecycle customer journey do not meet industry best standards and if stages are missing.

We reviewed every stage of your **customer journey** across digital channels



Our **Methodology**



Website

- ✓ Reviewed Google Analytics data
- ✓ Performed *Client* stakeholder interviews
- ✓ Performed a site competitor analysis
- ✓ Consulted industry case studies and best practices
- ✓ Pulled insights from past A/B tests



Paid Media

- ✓ Reviewed *Client* paid digital media across key channels
- ✓ Performed keyword analysis research on key terms associated with *Client's* product offering using a third party tool
- ✓ Researched competitors paid digital media



Lifecycle Marketing

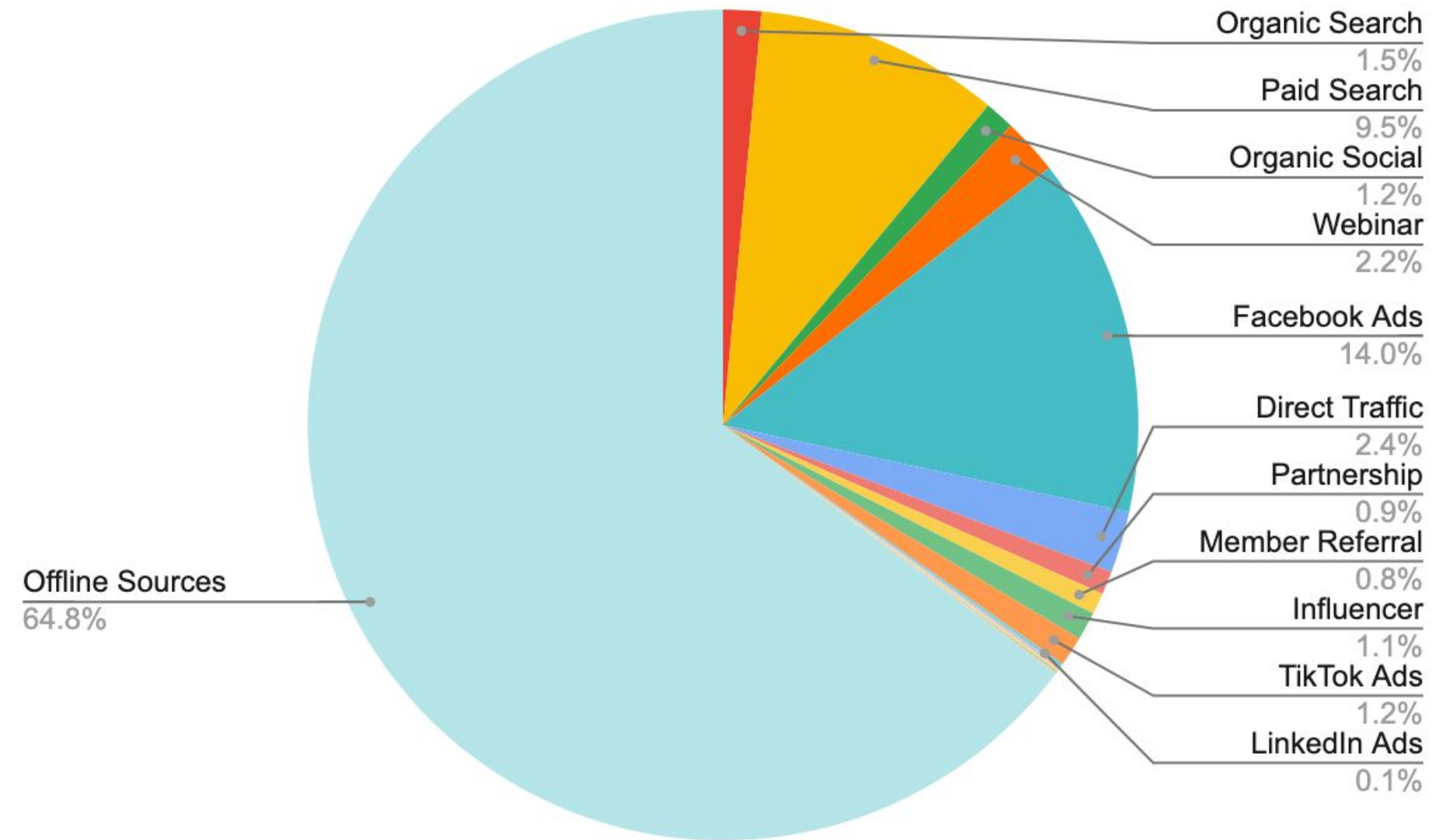
- ✓ Reviewed email experience from customer POV and backend HubSpot
- ✓ Leveraged stakeholder interview data to inform recommendations
- ✓ Consulted industry best practices and case studies to inform analysis

Research and Discovery



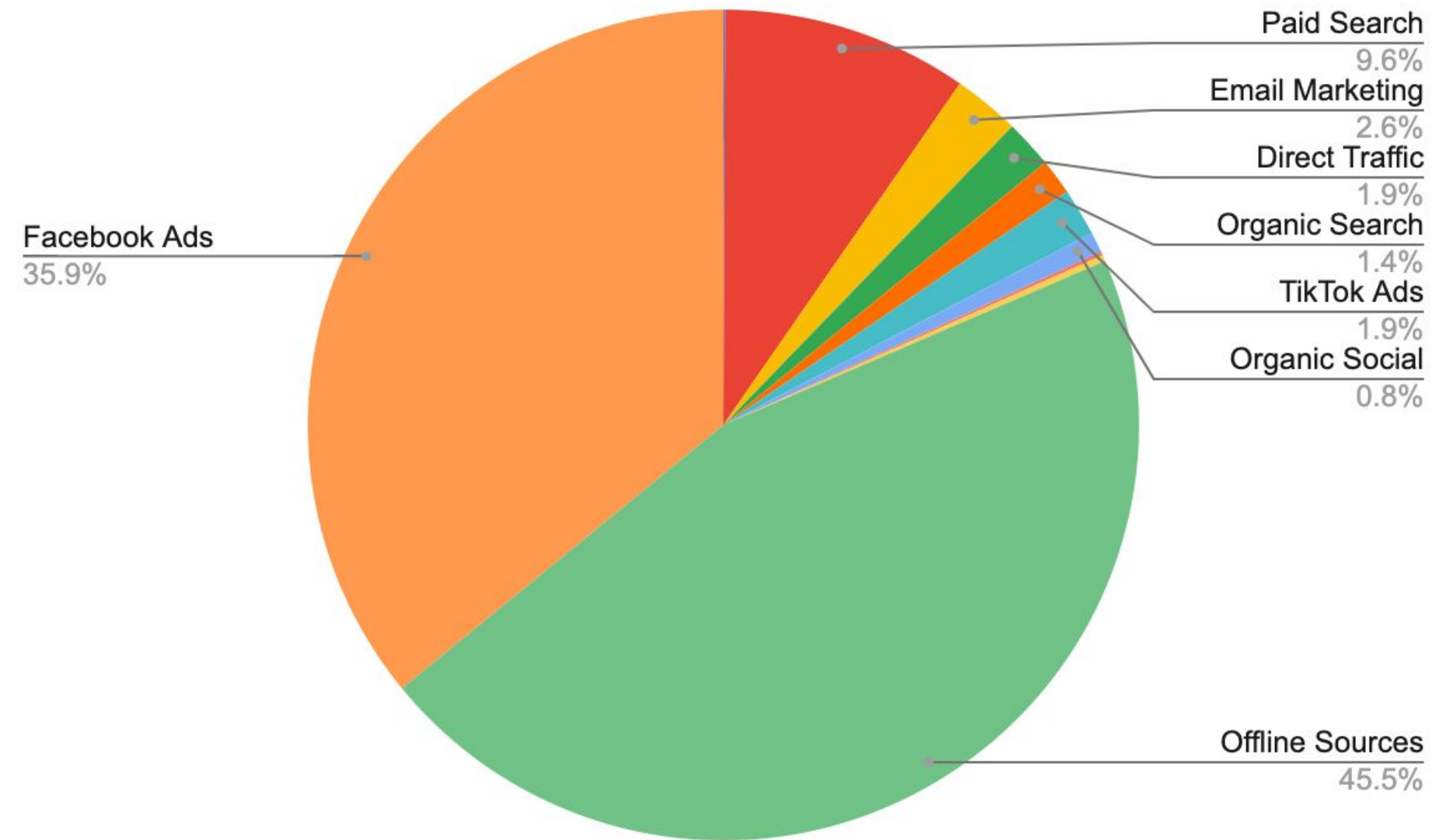
Leads are Primarily Coming From **Paid Social and Paid Search***

- Paid social and paid search account for nearly 50% of all leads
- Paid social accounts for 38% of lead acquisition with the majority coming from Facebook ads
- Imports and integrations with little to no source data account for 45.5% of leads
- Opportunity to create a consistent UTM tagging structure to eliminate inconsistencies and allow for easier lead tracking

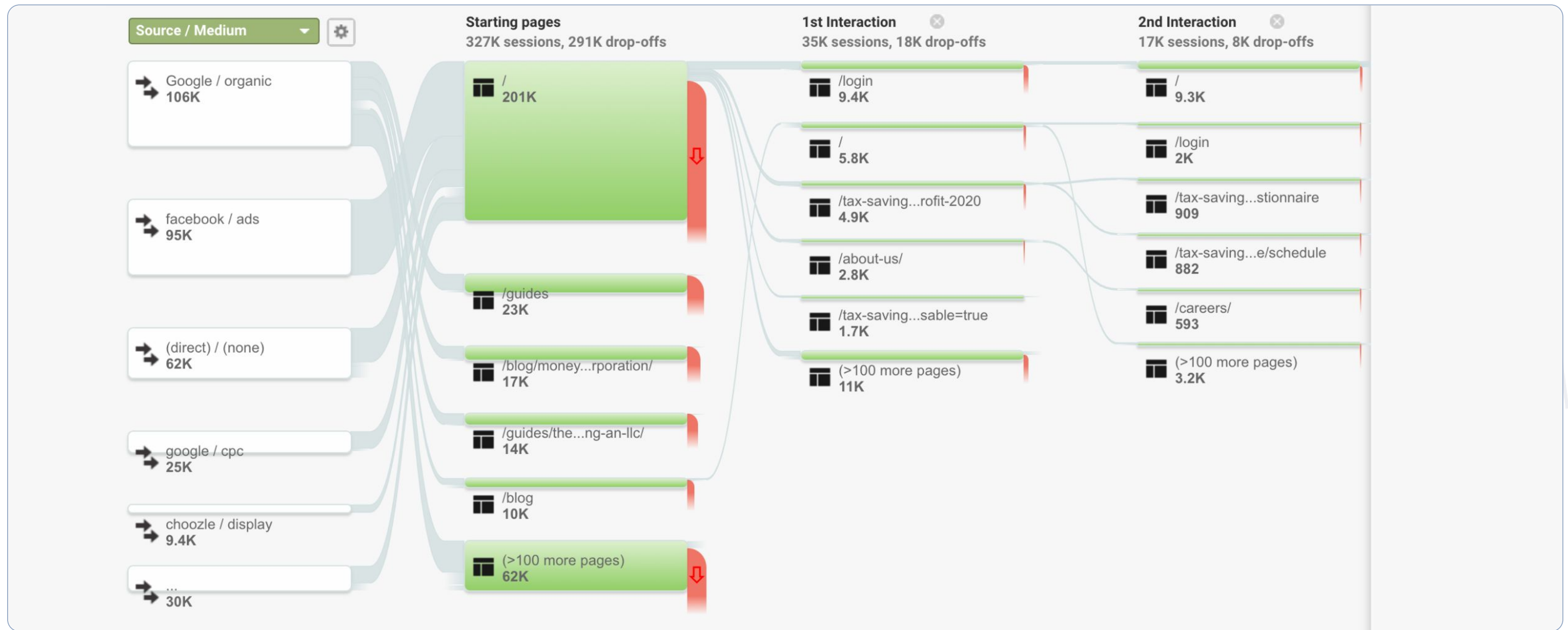


Offline Sources Make Up Majority of Member Source Breakdown

- Based on stakeholder interviews many new members come from referrals
- Referrals are happening over email and phone
- Opportunity to utilize HubSpot Inbox and phone integrations to track referrals more clearly
- Alternatively, review integrations and append data with missing information



Organic Leads Land on **Guides and Blog** While Ads Drive to **Tax Calculator**



Interviews Uncover Need to **Enhance Lead Quality & Invest in Full-Funnel Nurture**

“Marketing’s big task is to **mitigate the amount of ‘bad fits’ going through the calculator** to our funnel, optimizing for sales ready calls.”

“People really enjoy the **beginning stages of their time with *Client* during high touch periods**. Value is clear to them at this time point.”

“**Everything is really siloed**. We look at lifecycle as email but universally lifecycle is all of the channels that you use.”

“We’re not looking at it as a true journey. **There are little stops with no road that connect to get [leads] to the end.**”

“The value from **S-Corp makes them feel like they have “leveled up” their business and feel like a CEO/Founder**. It’s an aspirational achievement.”

All Roads Lead to the **Tax Calculator** Centering on **Decision Stage Leads**

“Everything leads back to the tax calculator. There isn’t anything else to submit to.”

Estimate your tax savings

With freelancers save an average of \$16,845 or more in taxes every year. Plus they never have to worry about the legal or tax side of running their business. See how much you could save with

[Estimate Your Tax Savings](#)



New and Returning Users Interested in Learning About S Corps and LLCs

The majority of new users coming from organic search end up on one of the top four blog posts:

- [S corp vs llc](#)
- [Llc vs s corp: which is the best for freelancers](#)
- [How to get a florida business license](#)
- [The ultimate guide to naming an llc](#)

The screenshot shows a website header with navigation links: How it works, Pricing, Testimonials, About Us, FAQ, Blog, Guides, Careers, and a Login button. The main content area features the title "LLC vs sole proprietor: The basics" and a sub-section "What's a sole proprietorship?". The text explains that a sole proprietorship is a one-person business where the owner handles all operations and is not a separate legal entity. It also notes that assets owned by the business are also owned by the owner, and that taxes are paid on business profits. A blue call-to-action box on the right says "ADD LEAD GEN OPP HERE".

- Leads seek the basics about solopreneur business operations
- Opportunity to capture leads via ebook and guide downloads on blog pages
- Opportunity to create email and paid landing pages to capture leads within a seamless, personalized experience across channels

Member Communications Include Educational Content Useful to Decision-Stage Leads

- Opportunity to set expectations and answer frequently asked questions earlier in the funnel to prime decision-stage leads for conversion
- Opportunity to highlight new states and Member Success Manager to set expectations for high intent leads

Your First Step with

What happens now? Great question! You'll be meeting with your Member Relationship Manager. This person will serve as your main point of contact at **Before your meeting** read through the following information and come prepared with questions.

Important reading for your business:

- [S Corp Introduction](#)
- [Quarterly Taxes 101](#)
- [Retirement Plans for S Corp Owners](#)
- [The Accountable Plan and Getting Reimbursed for Personal Expenses](#)

Here's some additional information to read through to help you better understand how **Support** supports you.

- [List of services we provide to our Members](#)
- [List of important Onboarding documents](#)
- [Calendar of important dates](#)
- [Instructions](#) on how to manually calculate and pay your Quarterly Tax Estimates. **Support** will automatically provide this service for you every quarter after your onboarding is complete. Until that automated process begins please follow these instructions. Many Members find it helpful to follow this article after their Onboarding Accountant helps them bring their S Corp Profit and Loss report up to date.

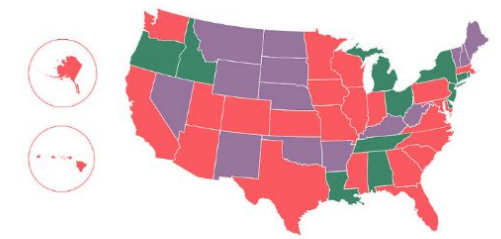
36 states – and counting

Part two of operation bring **Support** to all 50 states is happening right now. We're already in **your state**.

This week, we launched in **12 more**:

Michigan - Ohio - Oregon - Delaware - Idaho - Tennessee - Alabama - Louisiana - Rhode Island - New Jersey - New York - Connecticut

[Tell A Friend](#)



Key: **Now Serving** | **Launching November 1, 2022** | **Launching November 30, 2022**

More states means more opportunities to earn **\$600** per new member. Gift your network one month with your link and custom landing page.

Need some tips? Read below.

Tell a good story on LinkedIn

- Grab attention** Ask a question – especially one that people will respond to in the comments.
- Give solutions** Share a self-employment story and how contributed to the solution.
- Make it readable** Keep each paragraph 2 to 3 lines or less.
- Link in comments** Share your link in the comments instead of the post itself.

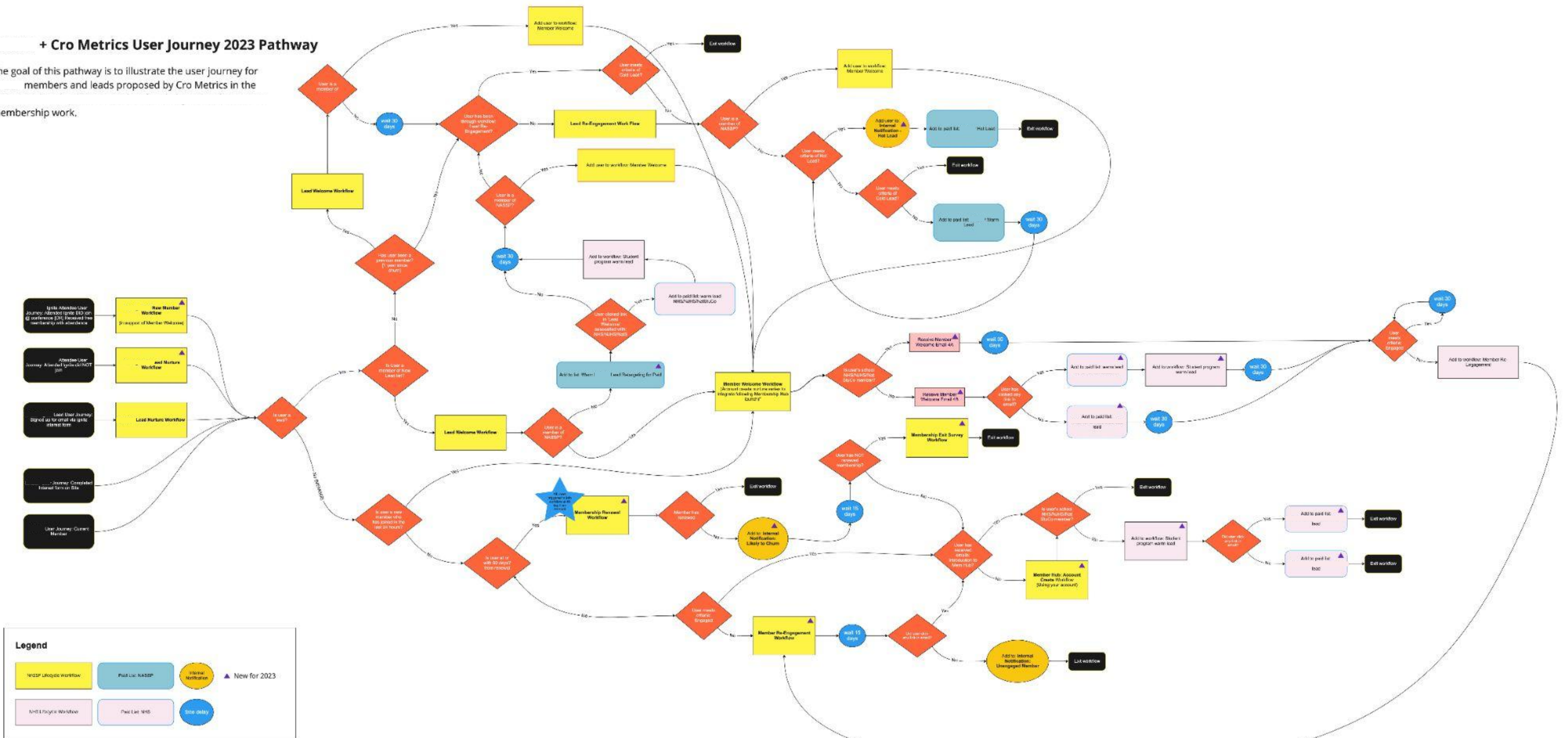
Take it to IG & TikTok

- Instagram** Put your referral link on your Linktree or profile.
- TikTok** Search trending sounds in hashtags related to your content – then use them and share your link.

Lifecycle **User Journey**

+ Cro Metrics User Journey 2023 Pathway

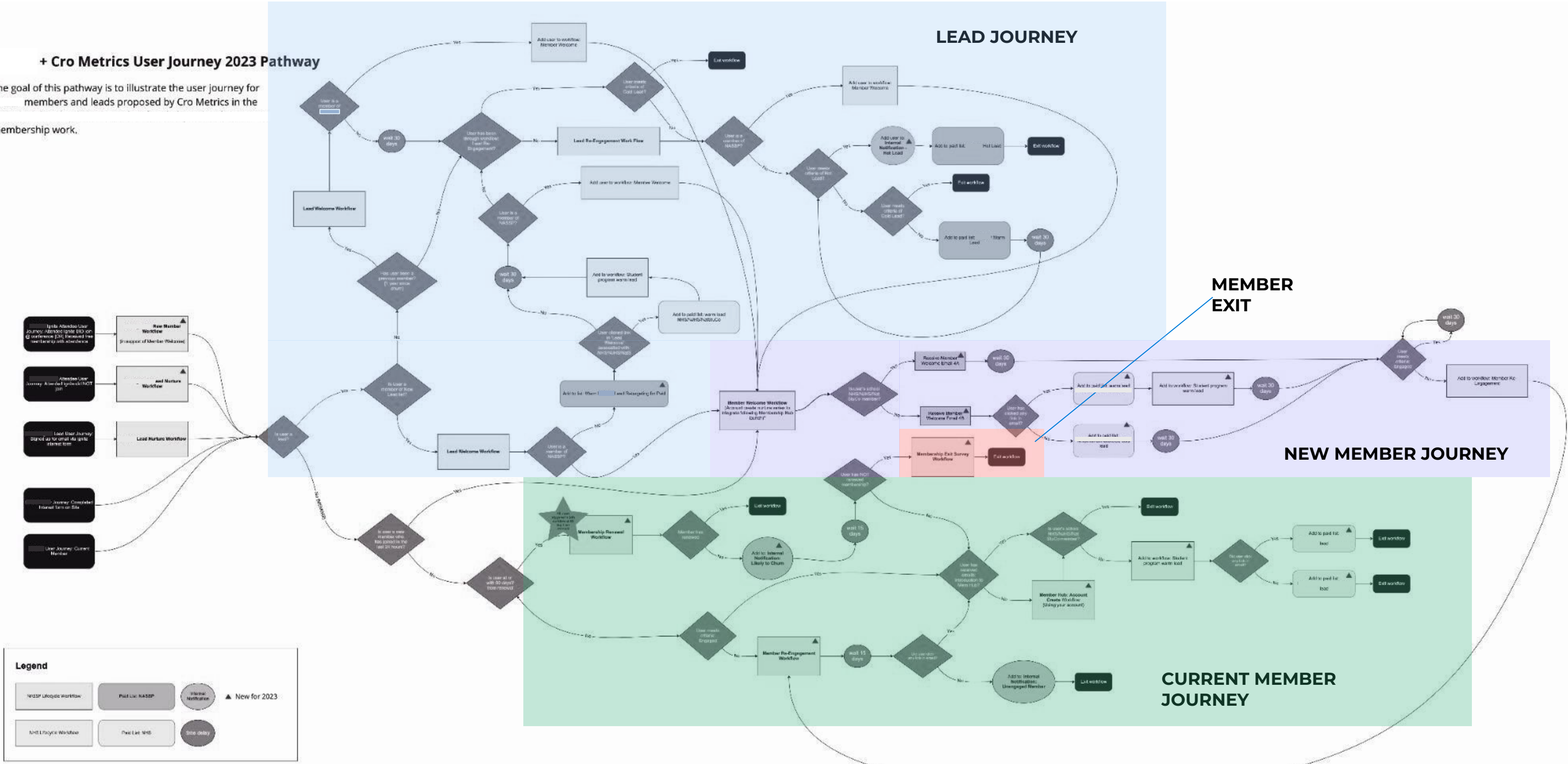
The goal of this pathway is to illustrate the user journey for members and leads proposed by Cro Metrics in the membership work.



Lifecycle User Journey

+ Cro Metrics User Journey 2023 Pathway

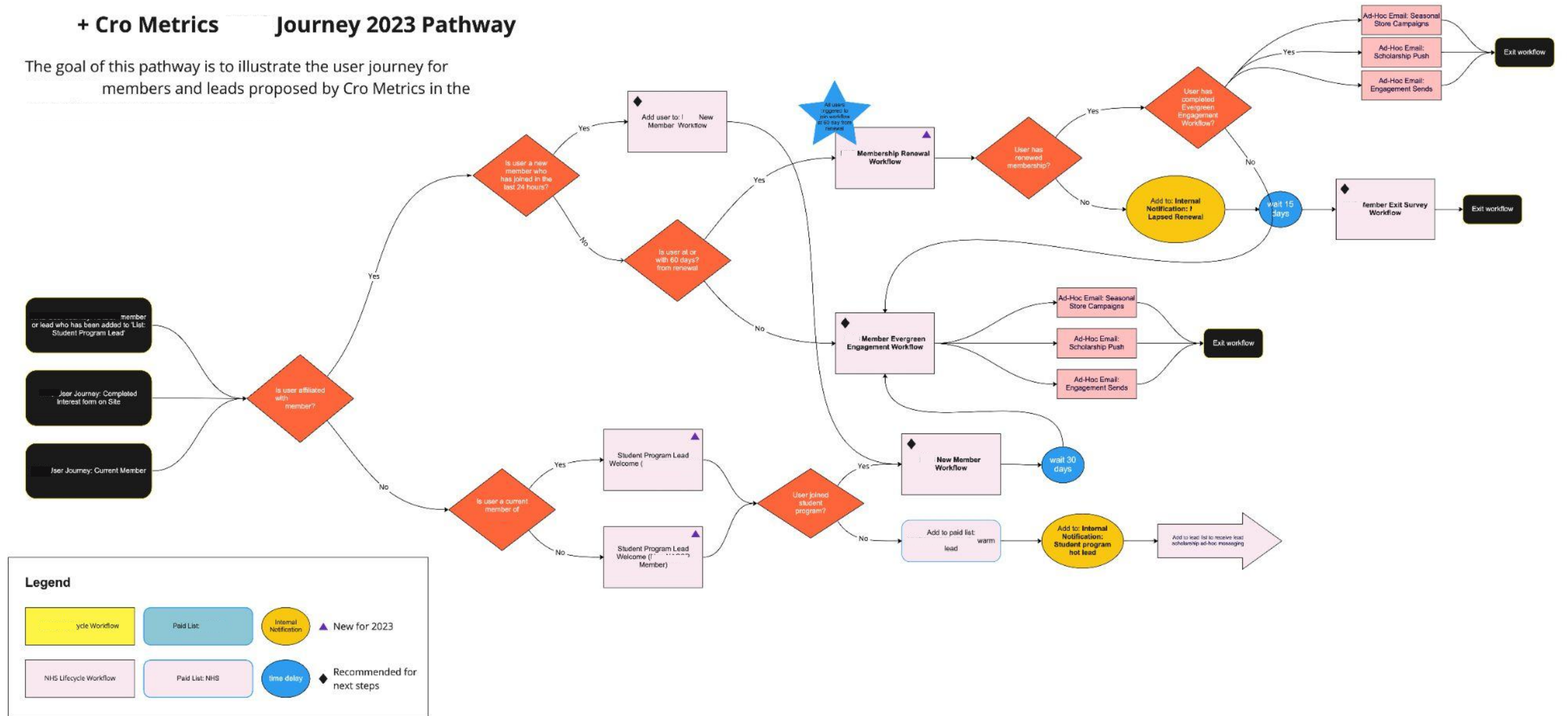
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Lifecycle **User Journey**

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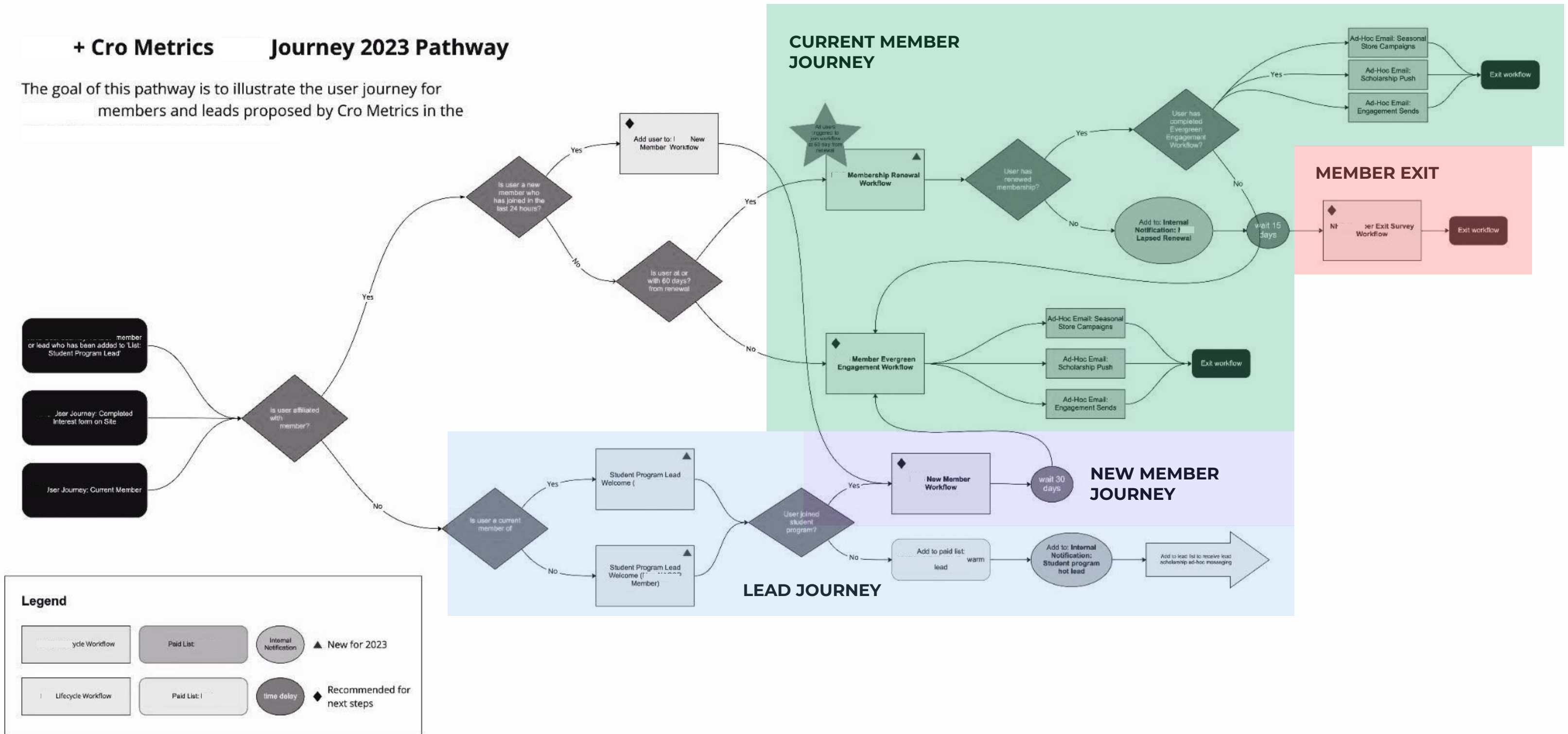
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Lifecycle **User Journey**

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Competitor Analysis



Client's Competitive Advantages

- ✓ Don't charge by the hour like CPAs therefore pricing is lower
- ✓ Treat members equally whether they make \$80K or \$800K
- ✓ Local CPAs focus on their top top earners not small biz
- ✓ Members get referral cash outs
- ✓ Offer a community of people who are all experiencing being a solo-entrepreneur at the same time.

Client's Competitive Disadvantages

- CPAs are local
- Can't handle every profession
- Can't handle C-corp or multi-member LLC
- Lack of consistent nurture through each stage of the customer journey
- No sales outreach like seen from Bench



Competitor 2 shares the most similar navigation to Client

Product/Solution Page Features	Client	Competitor 1	Competitor 2	Competitor 3	Competitor 4
Header CTA	Schedule Call	Start Free Trial	Schedule Call	Get Started	Hire a CPA
How it Works	X			X	
Pricing	X	X	X		
Testimonials	X			X	
About Us	X		X	X	
FAQ	X		X		
Blog	X		X		
Guides/ Resources	X	X			
Careers	X				
Login	X	X			
Partnerships			X		
Services / Capabilities		X	X	X	X
Community		X			
Home				X	
Our Freelancers					X
Your Benefits					X
Why 2%					X

Home Page Content Diversity Differs

The screenshot shows the Bench.com home page. At the top, a blue banner reads "You run your business. We'll handle your finances." Below this, there's a section titled "America's largest professional bookkeeping service for small businesses" with a "Schedule My Free Call" button. Further down, there are sections for "We partner with the world's best" (listing brands like Nike, Spotify, etc.), "Dedicated financial experts, just for you", "Powerful financial reporting", and "Tax season, minus the stress". At the bottom, there's a "Featured in" section with logos for Entrepreneur, Inc, and others, and a "Join thousands of small business owners who trust Bench with their books" section.

The screenshot shows the 1099ACCOUNTANT.com home page. The main headline is "Say hello to better online accounting" with a sub-headline "Powered by Real CPAs" and a "Schedule My Free Call" button. Below this is a "How Can We Help You?" section with icons for "Start a Business", "Business Taxes", "Payroll", and "Bookkeeping". A "CPAs are a business owner's best friend" section follows, highlighting "Affordable, flat-rate pricing. Never hourly." and a "Satisfaction Guarantee". At the bottom, there's a "Business & Tax Tips" section with three articles and a "Subscribe to our exclusive newsletter" form.

The screenshot shows the CPAExperts.com home page. The main headline is "Exclusive Network of Top 2% Freelance CPAs & Accountants". Below this is a "Meet a Few of Our Freelancers" section with profile cards for several CPAs. A "Benefits" section lists "Streamlined Billing Process", "Experience with Your Tech", "Experience in Your Industry", "Streamlined Contracts", "Ultimate Flexibility", and "Get Started Today". A "Why 2%?" section highlights "Industry Expertise", "Highly Rated", "Business Expertise", and "Platform Expertise". At the bottom, there's a "Freelancer Capabilities" section with icons for "Account Reconciliation", "Financial Reporting", "Internal Audit Services", "Accounting Standards", "Budgeting & Forecasting", "Tax Filings", "Payroll", "Accounts Payable", and "Cash Flow Management".

The screenshot shows the Accountant Price.com home page. The main headline is "Get 3 free quotes from the best CPAs. 100% free and non-binding!". Below this is a "How it works" section with three steps: "1. Fill in the Form", "2. Compare Quotes", and "3. Choose the Best". A statistics bar shows "337,698" quotes, "+5000" CPAs, "9.7" rating, and "18%" savings. A "What can an accountant help with?" section lists services like "Bookkeeping", "Financial Statements", "Business Accounting", "Tax Return", "IRS Representation", and "Financial Planning". A "337,698 users can't be wrong" section features logos for Forbes, Inc, Entrepreneur, and Yahoo!. An "About Us" section and a "Ready to find your next accountant?" section with a "Get Quote" button are also visible.

The screenshot shows the 1099.com home page. The main headline is "1 Month Free Trial 2 MONTHS OFF Sign Up Discount". Below this is a "How it works" section with a "Get Started" button. A "Pricing" section shows a comparison between "Monthly" (\$299) and "Yearly" (\$254) plans. A "Frequently Asked Questions" section is also visible at the bottom.

- Lead Gen CTAs
- Social Proof
- Blog Content
- Resources (Pricing, case studies, tax calc, etc.)
- Video Content
- Links to solutions or products

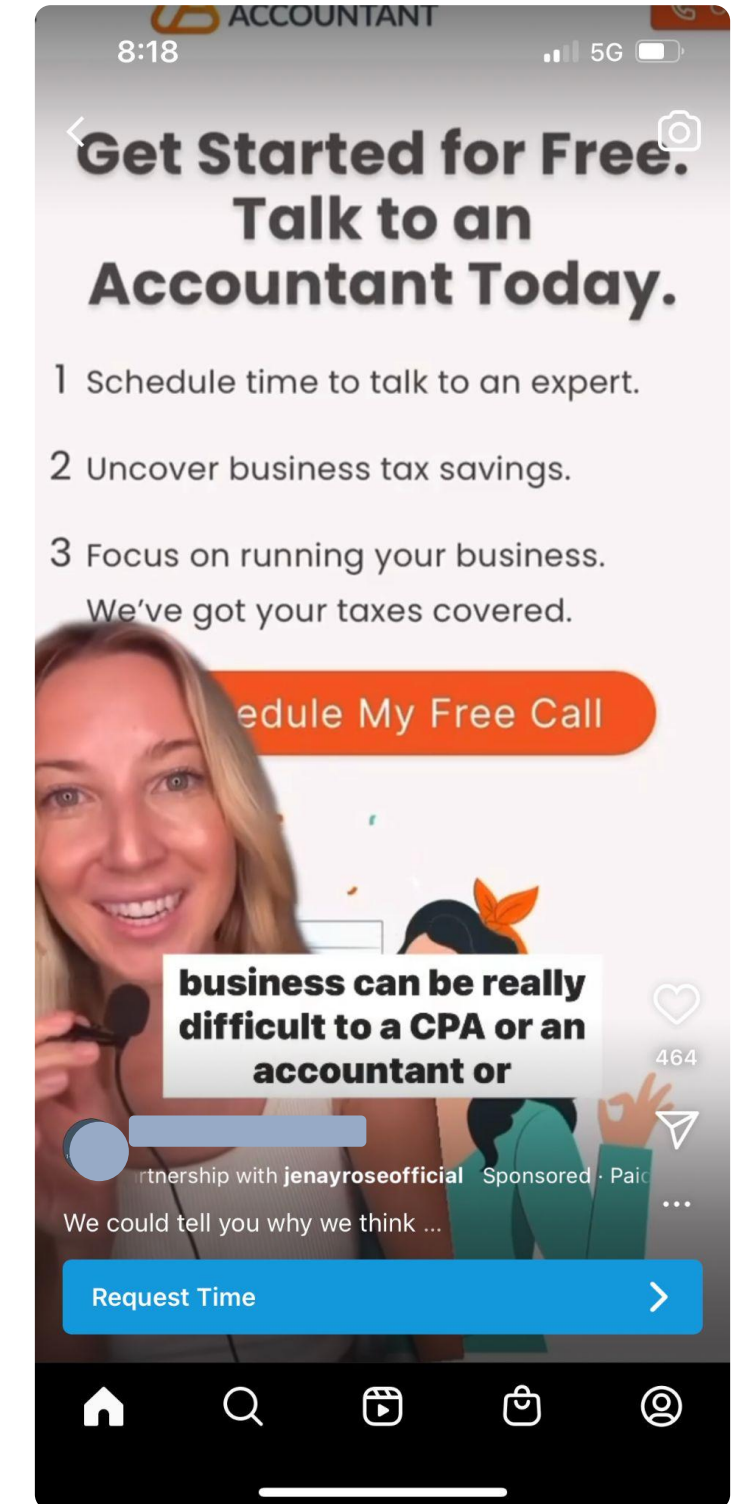
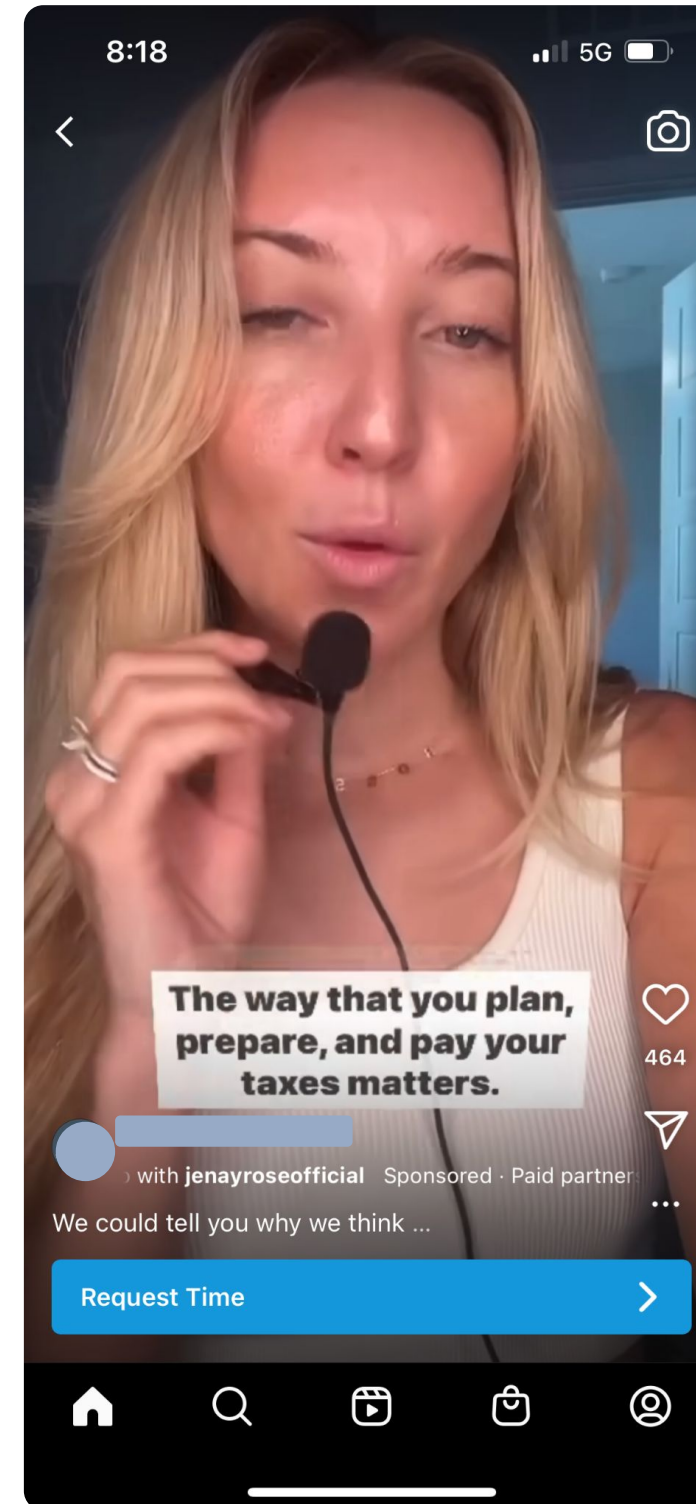


Opportunity to **Expand Home Page Features**

Product/Solution Page Features	Client	Competitor 1	Competitor 2	Competitor 3
Hero Image	Text and gif	Nondescript product shot	CPA gif	Nondescript product shot
Primary Call To Action	Schedule your call	Start a Free Trial	Schedule My Free Call	Get Started - Find Your CPA for Free
Secondary Call To Action	Get started	See How Bench Works	See Pricing	Get my Free Quotes
Case Studies on Page	No	Yes	No	No
Video Content on Page	No	No	No	No
Blog Content on Page	No	Yes	Yes	No
Additional Resources On Page	Yes	Yes	Yes	Yes
Links to Individual Products on Page	No	Yes	Yes	No
Social Proof On Page	Yes	Yes	Yes	Yes
Integrations on Page	No	Yes	No	No

Competitor 2 Uses Video and Entrepreneur Partnerships to Drive Engagement

- Competitor 2 uses paid partnerships to drive engagement and conversions
 - Highlights value prop of their offering over a CPA
 - UGC drives trust in brand
- Opportunity to invest more in UGC to meet leads where they are in the funnel
- Opportunity to test into video ads and partnerships on Facebook and Instagram



Organic + Paid Media Discovery

Top Organic Keywords Highlight Need for Lead Education

Keyword	Pos.	Diff.	Volume	Traffic %
>>	1 → 1	0	22.2K	47.93
llc names >>	1 → 1	0	3.6K	2.4
>>	1 → 1	0	880	1.9
s corp vs llc >>	11 → 11	0	18.1K	0.92
llc vs s corp >>	9 → 11	↓ 2	18.1K	0.92
sole proprietorship vs llc >>	10 → 10	0	14.8K	0.87
florida business license >>	5 → 5	0	5.4K	0.63

Opportunity to Expand Reach Across “S corp vs llc” Broad Match

All keywords: **933** Total volume: **58.9K**

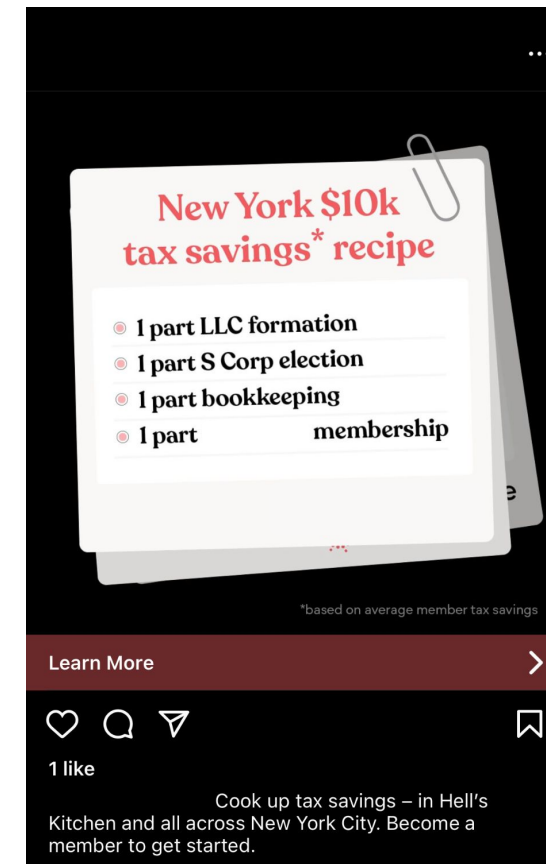
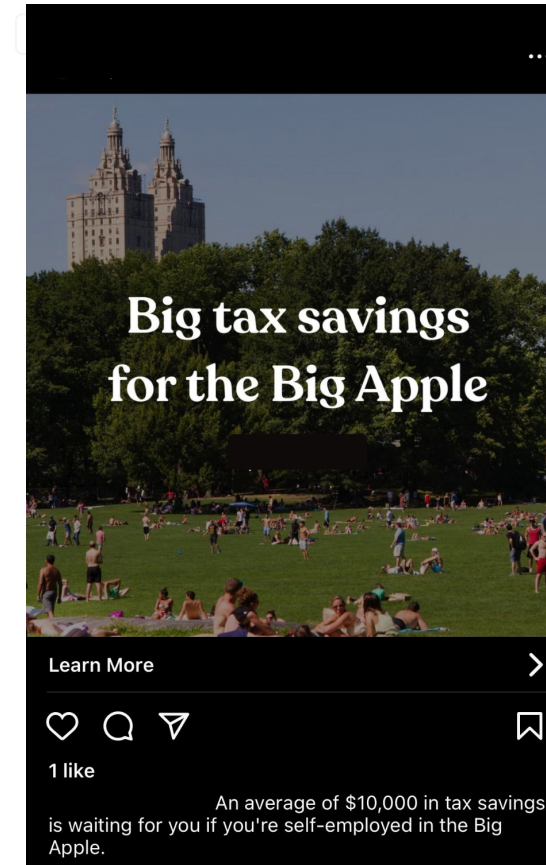
<input type="checkbox"/>	Keyword	Intent	V...	Trend	KD %	C...	C...	SF
<input type="checkbox"/>	+ llc vs s corp >>	I C	18,100		72 ●	1.96	0.33	+4
<input type="checkbox"/>	+ s corp vs llc >>	I C	18,100		72 ●	1.96	0.33	+4
<input type="checkbox"/>	+ s-corp vs llc >>	I C	2,400		68 ●	1.96	0.33	+3
<input type="checkbox"/>	+ llc vs s-corp >>	I C	1,600		70 ●	1.96	0.33	+4

Geotargeting Ads

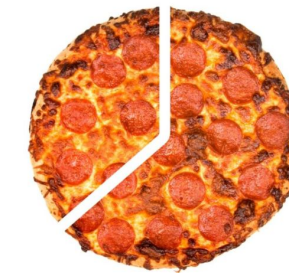
Focus on Tax Savings

Ad creative:

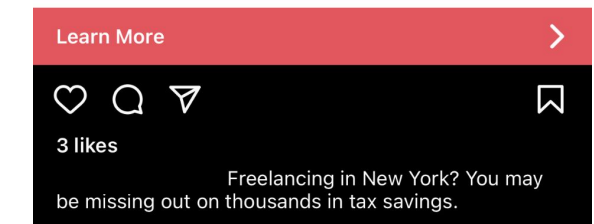
- Leverages tax savings as primary engagement driver
- Opens opportunity to test into additional value propositions
- Speaks directly to different customer demographics through geo-specific ads



1/3 of New York is freelancing



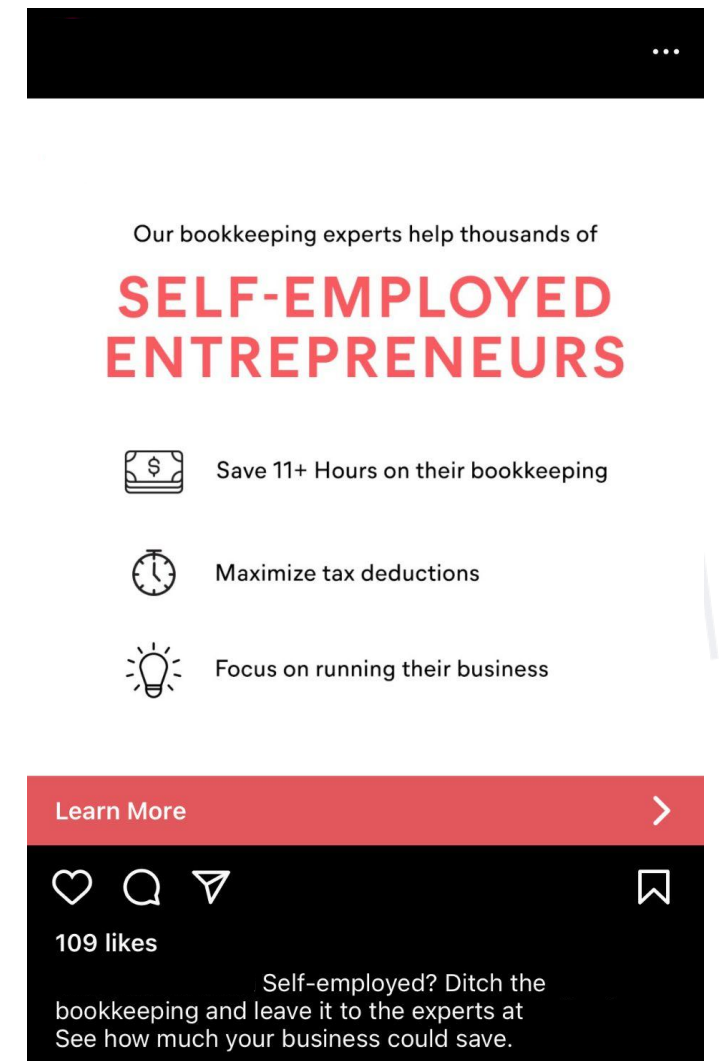
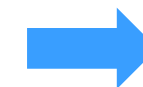
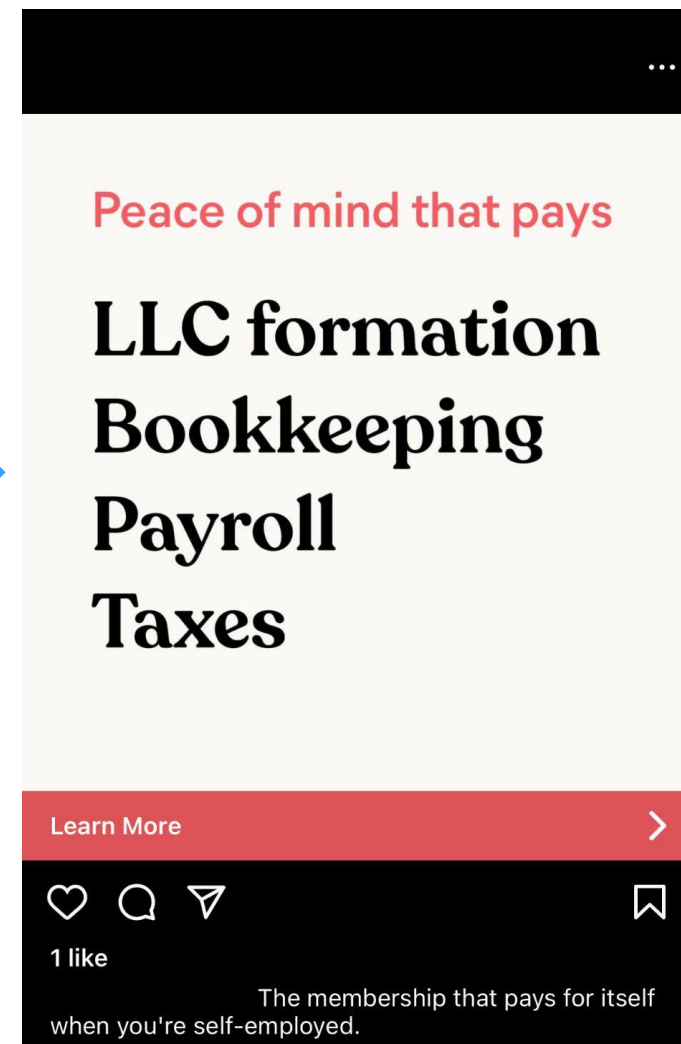
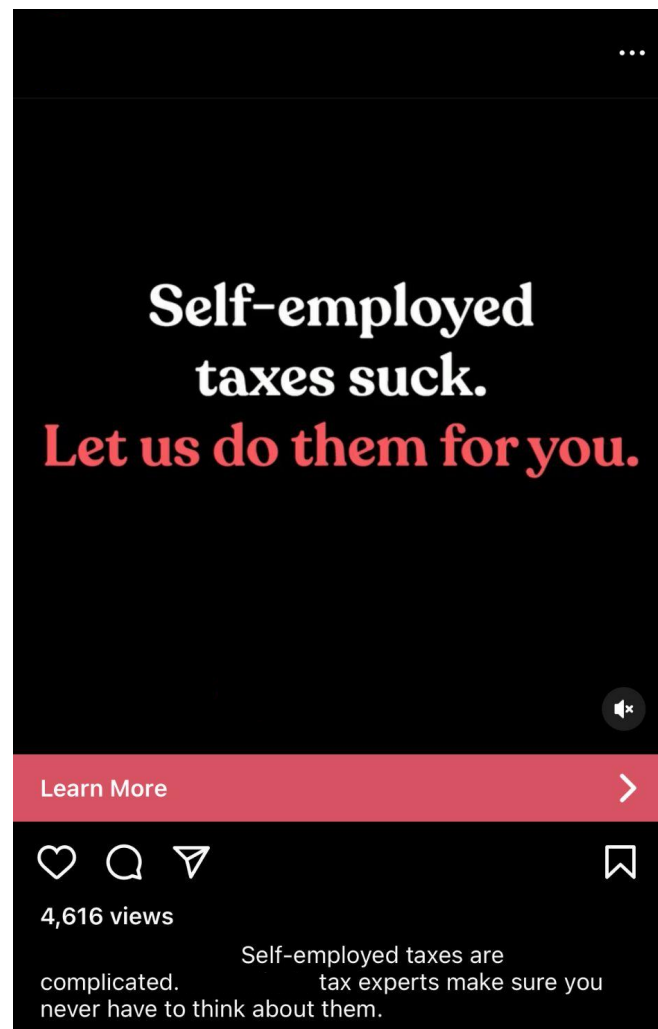
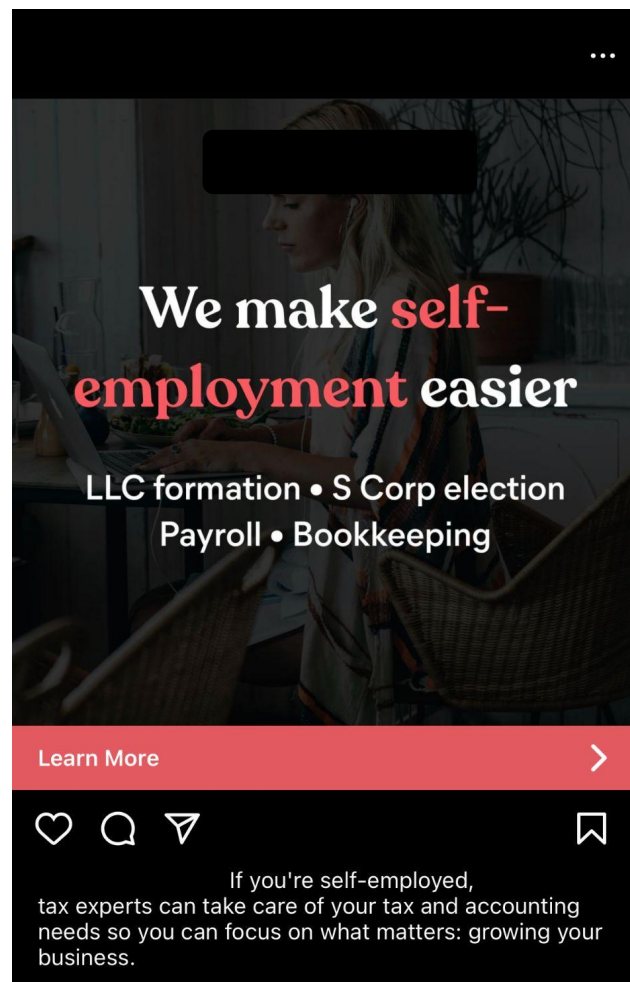
1/3 of New York could save with



Opportunity to **Prime Leads for Sales Readiness**

Channels and strategy:

- Regardless of touch point all ads in funnel direct leads to tax calculator form
- Opportunity to use a multi-campaign, full-funnel strategy, consistent with our recommended approach and best practices.



Our **Recommendations**

Awareness



Solicit **Positive Reviews** and **Customer Testimonials** for Key Review Sites

Details

Client lacks in quality and quantity of reviews for some key review sites. Ensure all business lines are represented on each review site. *Client* is only represented on Trustpilot.

- **Trustpilot:** 8 Reviews at a 2.3 star rating
- **G2:** Unavailable
- **Capterra:** Unavailable
-



Reviews 8 • Poor



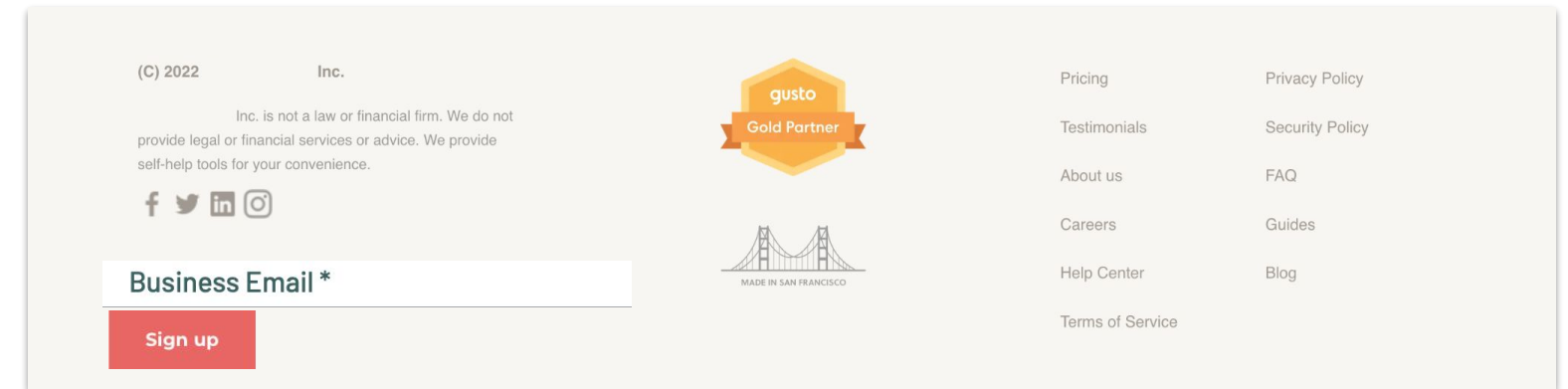
Optimize Site for Email Collection Rates

Details

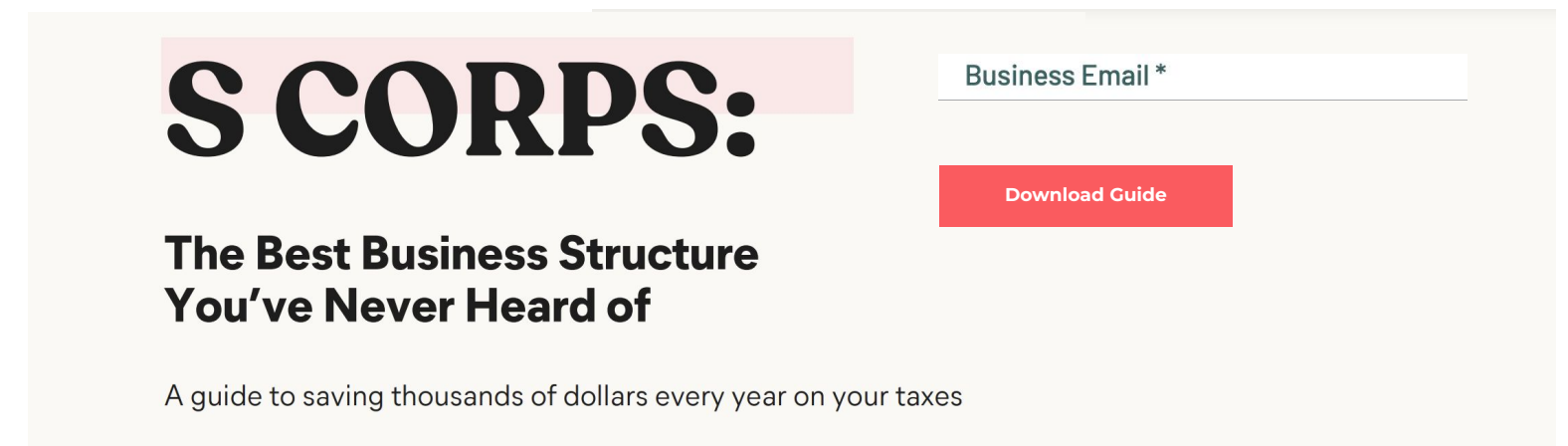
Test into the best way to collect additional email. Leverage site content & webinars, re-designed email forms and the onsite chat to increase the email capture rate of users within the consideration phase. This will provide a larger reach for email marketing.

Metrics

Email Capture Rate



Test into email form UX



Test an email only lead form for onsite content

Paid Media

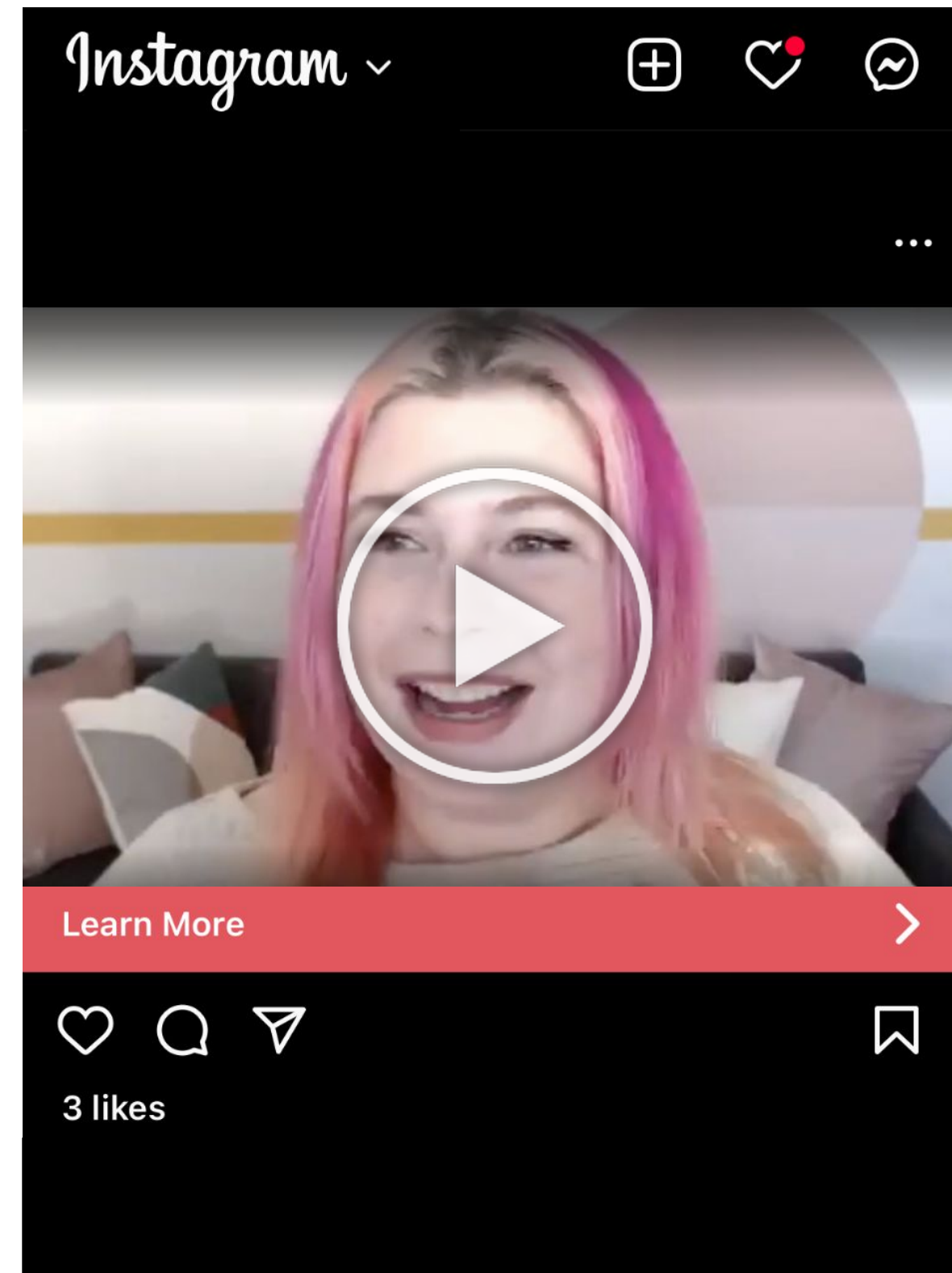
Test into Video in Ads to Increase Awareness Stage Lead Acquisition

Details

Test into short-form video content on social. Leverage webinar content, blog posts, and guides to inform leads in awareness stage.

Metrics

Click-through rate





Set Expectations with Language Around User Income Requirements

Details

Increase lead quality and conversion rate with clear expectations around \$80K+ income requirement for members.

Metrics

SQL Form Conversions

Meetings Booked

Why is **invitation-only**?

Even though we'd love to help everyone, our goal is to assist those who'd benefit the most from . Full-time solopreneur, like marketing consultants, coaches, designers, software developers and creatives who make over \$80,000/year, find the most value in . The majority of our members come from referrals, so if you know someone we should talk to, let us know.

Our **Recommendations**

Consideration

Paid Media

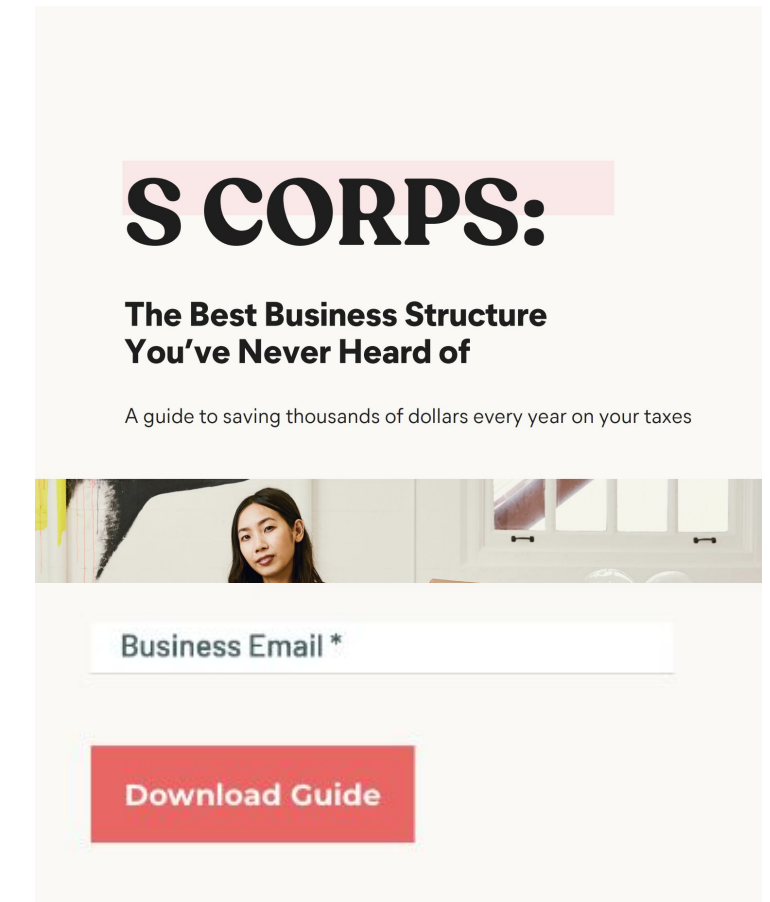
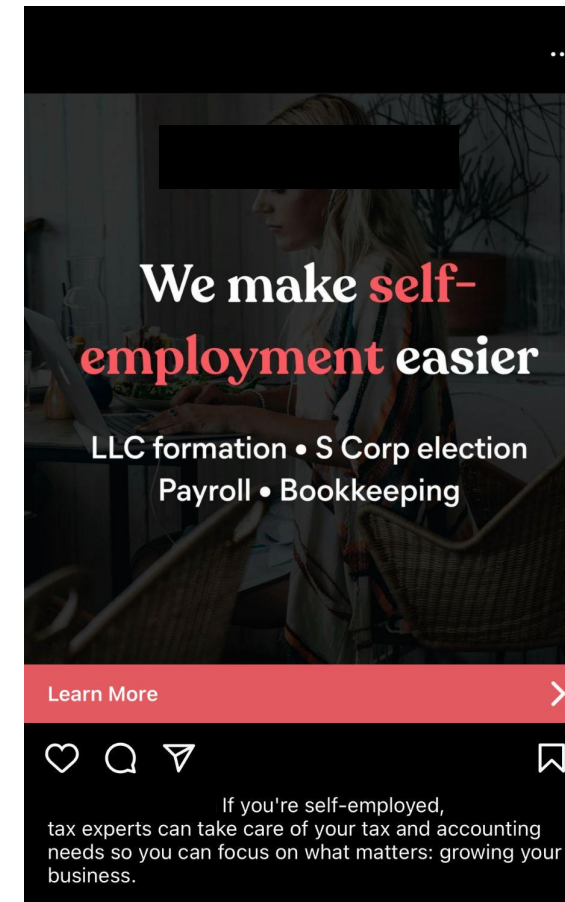
Invest in **Relationship Building** and **Capture TOFU Leads**

Current social creative centers on mid-to bottom of funnel.

There is an opportunity to relationship build ahead of asking for an action like a tax calculator or meeting schedule.

Value-based content, such as guides or resource downloads, can support audiences building brand trust.

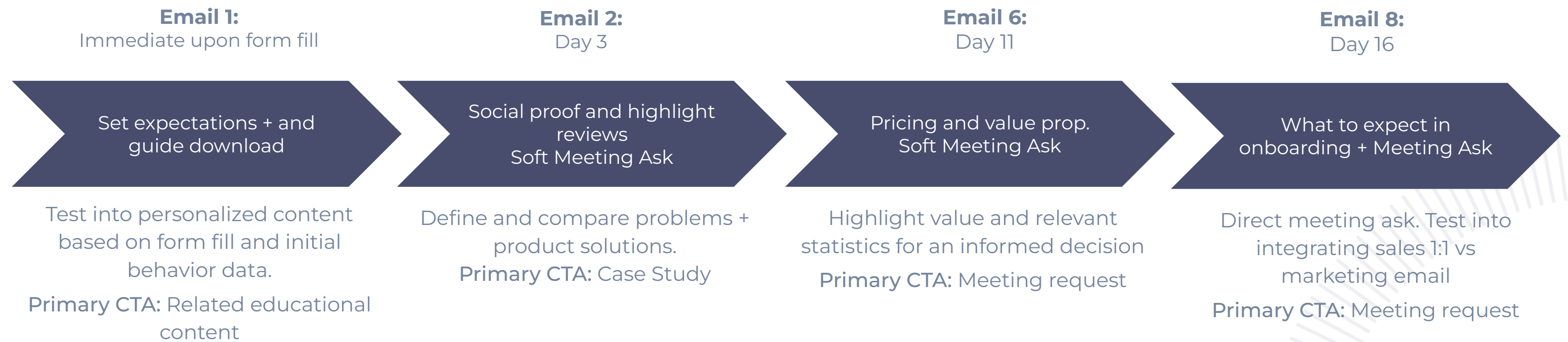
A full funneled strategy is recommended on social, including introductory brand content, a value-based resource and then requesting an action.





Educate Awareness and Consideration Stage Leads with Educational Nurture Series

Increase tax calculator conversions through a consistent, personalized series underlining solutions and the problems it solves for specific customer personas.



**Continue to value proposition series for those who don't convert*



Build Trust by Increasing the Presence of Social Proof in Email

Details

Leverage reviews, customer testimonies and awards to build trust with potential customers.

Personalize testimonials based on lead industry / services

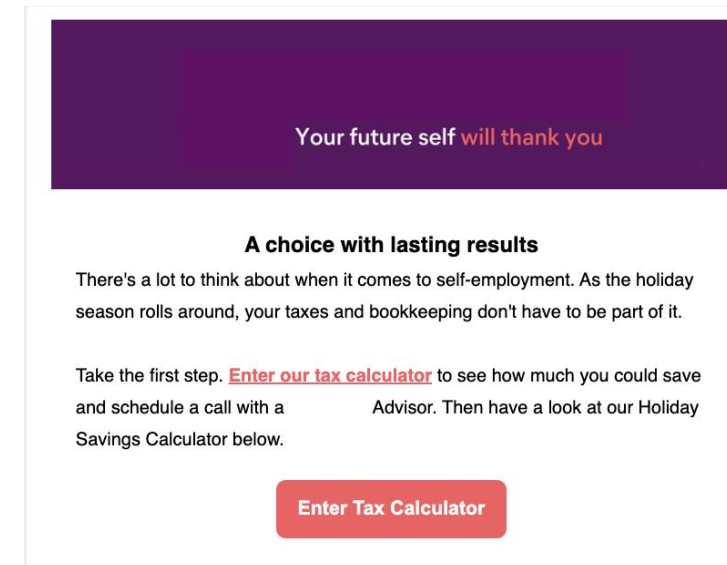
Metrics

Click-through rate

Conversion rate

Additional Opportunity

Test into from names to increase trust and buy-in

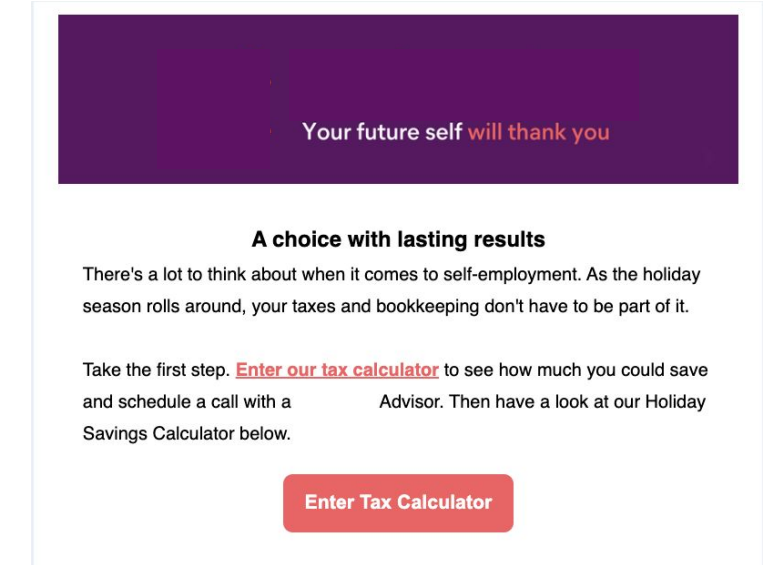


simplified the complexities of setting up and managing my new business. It makes the process super simple and saves me a lot of money on taxes.”



David
Working on next-gen digital health

v1



As seen in:



v2



Test Into **Value Proposition** and **Key Competitive Differentiators**

Details

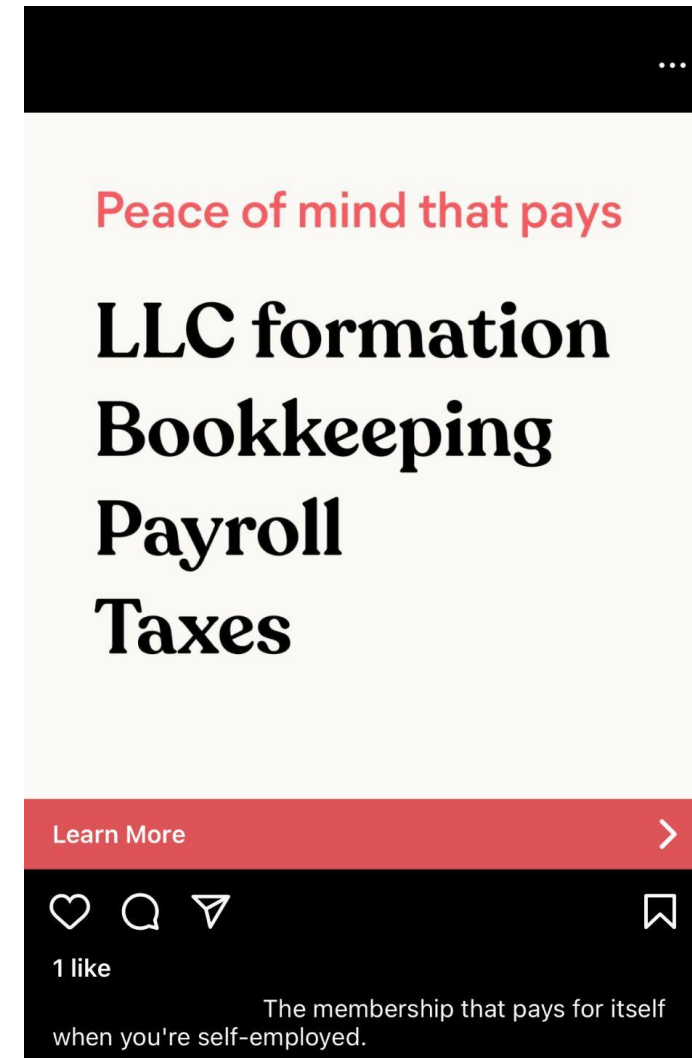
Business formation jargon may make it hard for leads to know what benefits are. Test into the most powerful value props and best locations to highlight them.

Tax savings, Bookkeeping

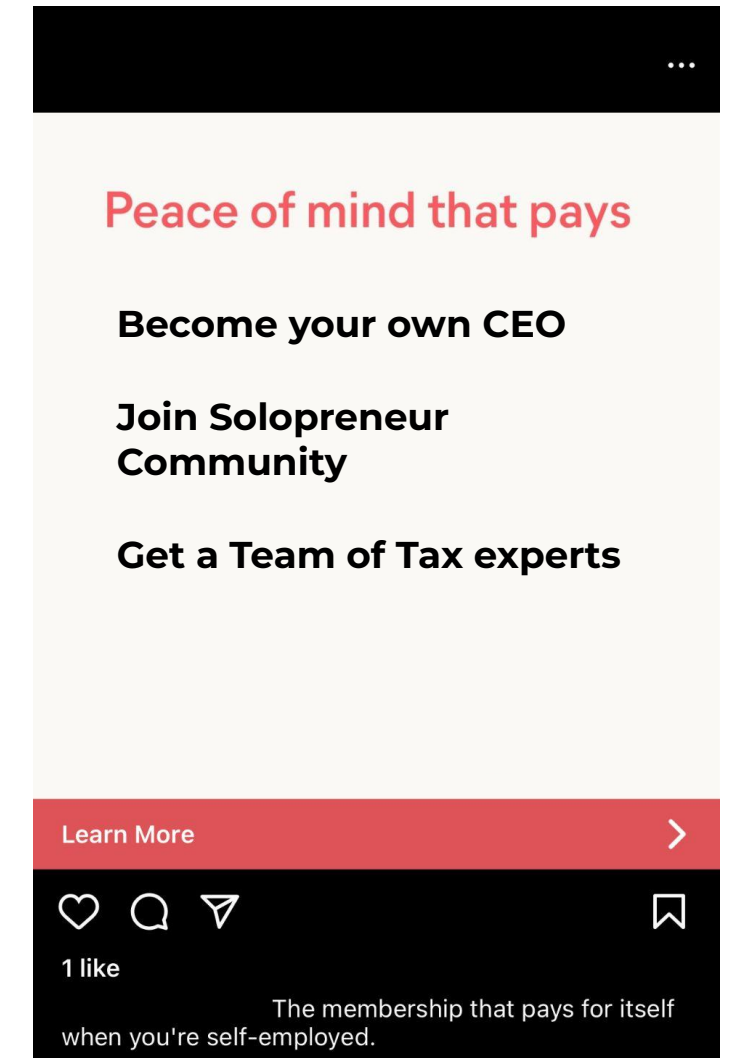
Community of Solopreneurs

Becoming your own CEO / legitimizing services with S corp

Designated Member Success Manager



control



v1

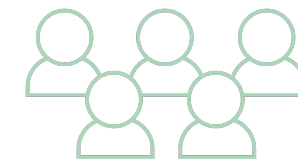


Test into Lead Scoring to **Identify Highly Engaged Sales-Qualified Leads**

Details

Determine the priority of your leads and when they are ready to engage with the sales team. Segment MQLs and SQLs by lead score to further understand persona behavior and needs.

Tier 3: 0-30 points

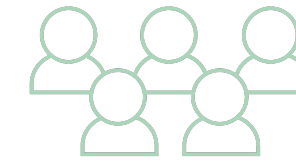


Sample Point Attributes

+5 pts: clicks email link

+5 pts: views blog post

Tier 2: 31-60 points

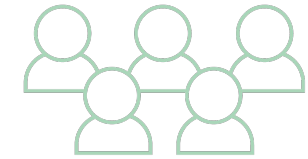


Sample Point Attributes

+15 pts: downloads guide

+15 pts: signs up for webinar

Tier 1: 61+ points



Sample Point Attributes

+20 pts: attends webinar

+25 pts: schedules meeting

Our **Recommendations**

Decision

Assist Users in Self-Identifying Needs and Leverage that for Personalization

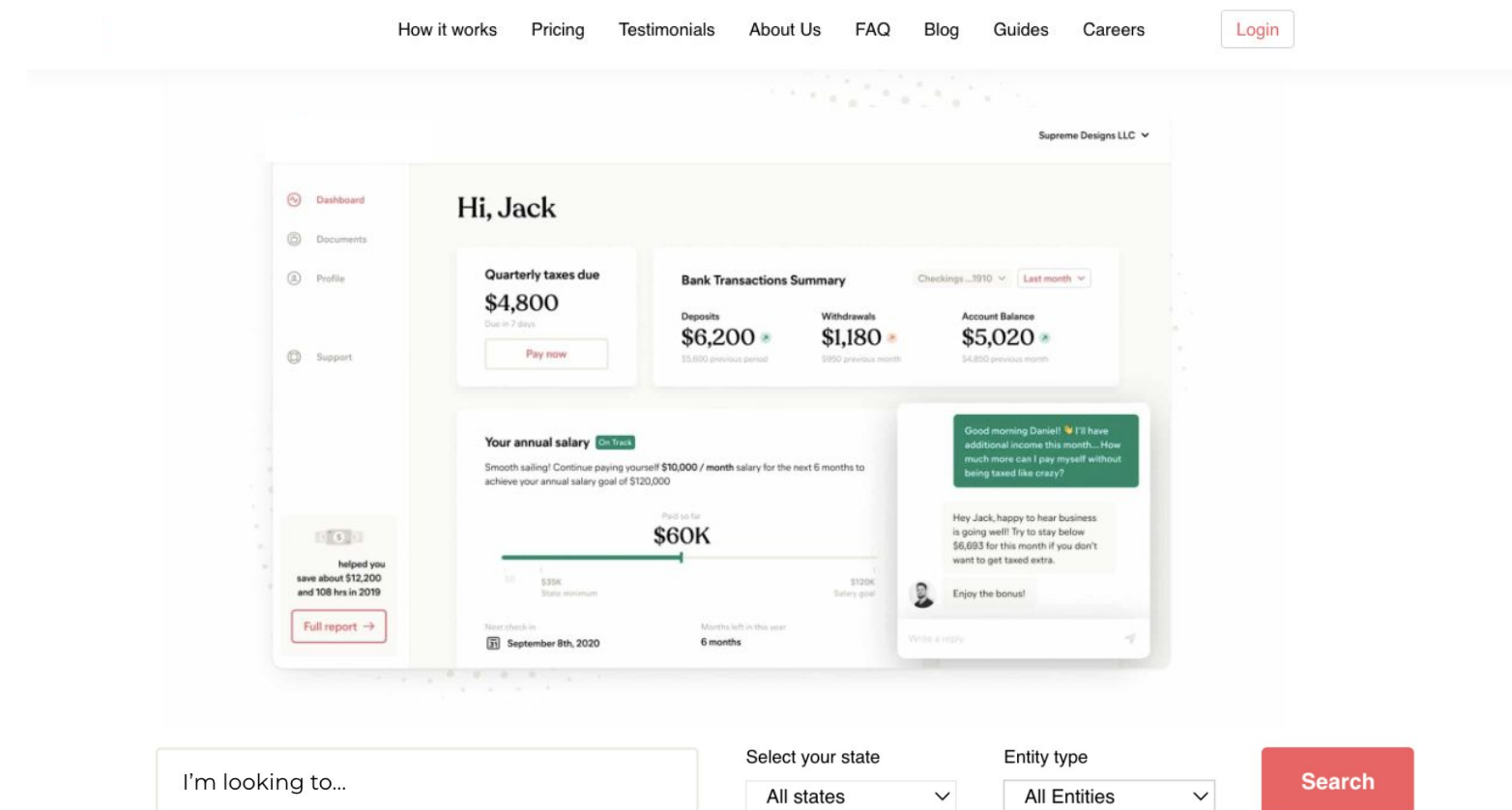
Details

Test into the best way to assist users in telling us what they need. This is one of the first steps in identifying what solution is right for the customer. By testing into the correct way to extract this information from the customer, it can then be used to nurture the prospect.

Metrics

Email submissions

Content downloads



You have the power to control your financial future. It's time to unleash it. offers the first back-office designed for Businesses-of-One – company formation, tax, accounting and bookkeeping services.

Getting started is easy

, we're kind of obsessed with **S Corps**. Why? Because the way you organize your business makes a big difference in how much you pay in taxes. And for most self-employed businesses, **forming an S Corp could lead to big tax savings.**

When you become a member, you get your own accounting team and software to track and manage your finances.

- 1 Calculate your potential tax savings**
Answer a couple of questions about yourself and your business to calculate your potential tax savings by becoming an S Corp and running your business with
- 2 Talk to a Advisor**



Ensure the User has Quick Access to the Sales Team

Details

Expand chat to interface with leads. Due to the nature of users further in the evaluation process, providing them easy access to sales and more detailed on site content is key.

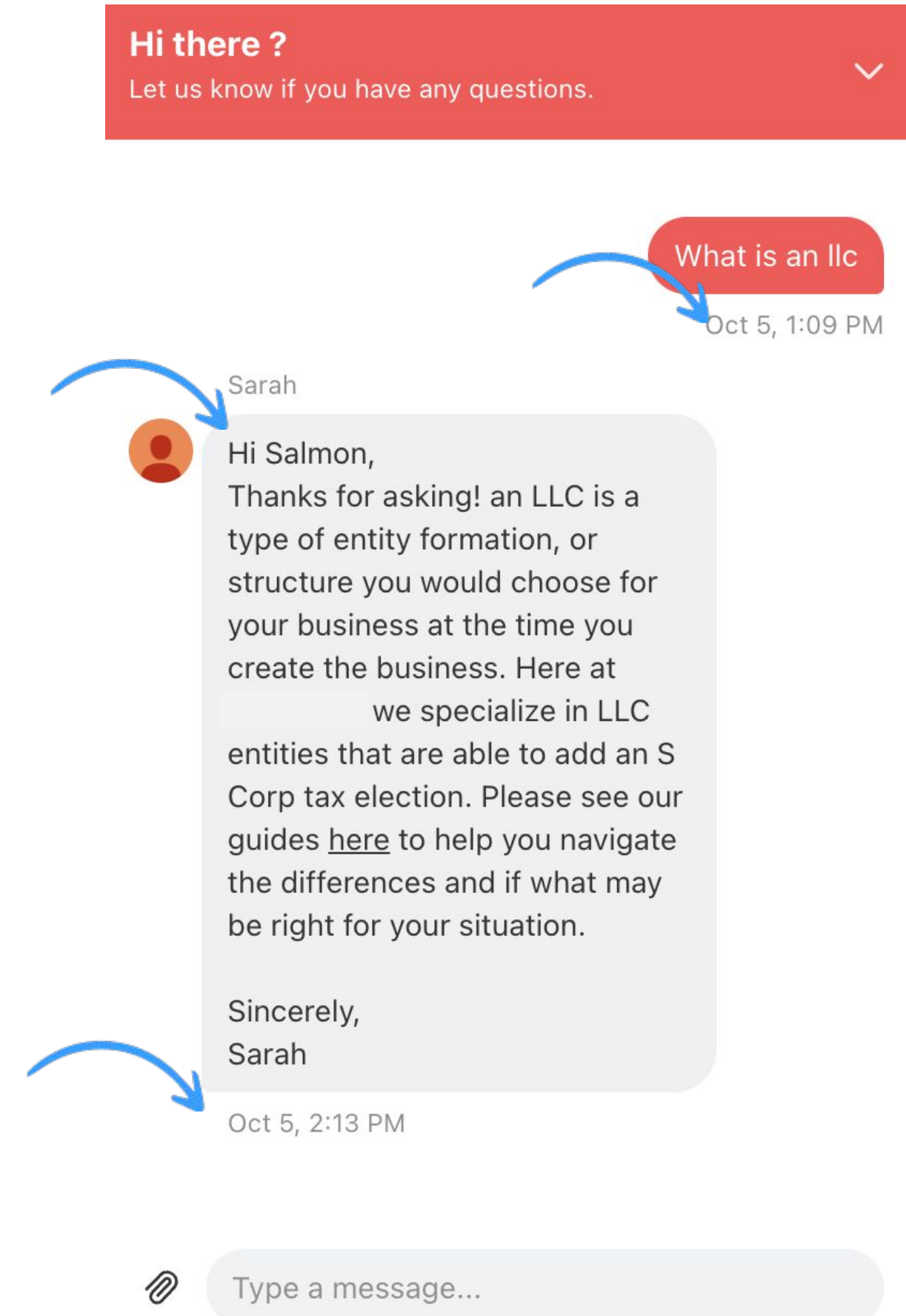
Metrics

Meetings booked

Conversions

Additional Consideration

QA chat flows to ensure accurate personalization and response time





Create a **Personalized 1-to-1 Experience for SQLs with Sales Sequencing**

Details

Investing in automated 1:1 sales sequencing that is consistent, helpful, informed by marketing testing, and enhanced by lead data will increase conversion rates. Additionally saving sales reps critical time for high-intent SQLs creates an optimal sales process and more closed deals, faster.

Metrics

Time to deal close

Conversion rate

2. Automated email Actions ▾

Send email in

Template: [Recent Conversion \(Email #1\)](#) Owner: Julia

Subject: What did you think?

Hey Contact: First name ,

I saw you downloaded X CONTENT from our website and was curious what you thought about it.

[▾ See more](#)



Generate Leads In-channel to Increase Conversion



Existing bottom-of-funnel ads link to the website and could benefit from in-channel lead forms.

In-channel lead forms allow audiences to request a meeting or more information within LinkedIn.

Conversion rates are often higher on in-channel lead forms than BOFU conversion ads because target audiences are not asked to leave the channel in which they already chose to spend their time.

As a result, most brands also see cost efficiencies when using in-channel lead gen.

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LLC VS S Corp: Which One is Best for You?

December 15th, 2022
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LIVE WEBINAR

Holistic Approach



Cross Channel Recommendations for **Each Stage of the Customer Lifecycle**

Crawl (0-3 Months)	Walk (3-6 Months)	Run (6-12 Months)
<ul style="list-style-type: none"> - Combine CRO + lifecycle strategy to test into email form input fields, messaging, and placement on site - Define lead scoring to identify high-intent leads and learn about their behaviors and needs - Utilize buyer personas to identify common traits among leads and allow for better segmentation - Revamp the welcome series to familiarize leads with and differentiate between offerings. Learn how primed they are to buy. - Test into content and invites (webinar vs recording) in ad hoc campaigns to learn more on lead and customer preferences - Develop a quality assurance process to ensure error-free messages 	<ul style="list-style-type: none"> - Develop an educational nurture series for each problem solves to educate leads on offerings to nurture them toward an informed decision - Utilize lead behavioral data, lead score, and personas to inform nurture series strategy including series triggers and conditionals - Test into value proposition by leveraging popular site content, sales calls, and lead behavior - Develop sales playbooks to insure a consistent positive experience across product lines - Combine lifecycle + paid strategy to retarget leads at each stage on paid channels. Ensure consistency across touchpoints to provide the lead with an easy-to-follow full-funnel journey - Revisit lead scoring: Analyze CVR of SQLs handed off to sales. Are they sending leads back to marketing? How can we optimize? 	<ul style="list-style-type: none"> - Prioritize automated sales 1:1 messaging for lower quality SQLs to open up time for sales reps to prioritize target accounts and highly engaged leads - Begin testing into nurture series length and cadence to align with optimal time-to-close and highest CVR - Create additional nurture journeys for each decision stage. Personalize based on persona and product interest - Invest in development of nurture series centered on specific topics, asset offers, engagement, re-engagement, and post-purchase engagement - Test into SMS to determine optimal message delivery

Cross Channel Recommendations for **Each Stage of the Customer Lifecycle**

	Awareness	Consideration	Decision
Website	<p>Assist paid media and Email campaigns with landing page experiences</p> <p>Optimize for email collection rates</p>	<p>Ramp up content utilization in the form of blog posts, guides, and toolkits to be used as lead magnets.</p> <p>Optimize for meeting requests and contact form submissions</p> <p>Highlight value propositions and key differentiators throughout the site.</p> <p>Test into solution focused messaging</p> <p>Assist paid media and Email campaigns with landing page experiences</p>	<p>Ramp up content utilization in the form of blog posts, guides, and toolkits to be used as lead magnets.</p> <p>Optimize for meeting requests and contact form submissions</p> <p>Highlight value propositions and key differentiators throughout the site.</p> <p>Test into solution focused messaging</p> <p>Assist paid media and Email campaigns with landing page experiences</p>
Paid Media	<p>Diversify keyword bidding on Paid Search. Leverage non-brand keywords for prospecting to support customer growth.</p>	<p>Invest in developing content and campaigns to enable full-funnel advertising strategies on Paid Social across key target target audience.</p> <p>Build trust by increasing the presence of user-generated content</p>	<p>Test into in-platform lead form ads and compare results value to traditional BOFU conversion ads.</p> <p>Leverage learnings to optimize full-funnel strategy</p>
Lifecycle		<p>Invest in automated lead nurture taking product interest, persona, and lifecycle stage into consideration: Welcome series Educational product series Topic series</p> <p>Build trust by increasing the presence of social proof in email</p> <p>Test into value proposition, content, segmentation, personalization, and cadence to increase engagement and conversion</p> <p>Utilize personas and lead scoring to further segment and personalize the customer journey based on source of entry, demographics and behaviors</p>	<p>Invest in automated lead nurture taking product interest, persona, and lifecycle stage into consideration: Engagement series Post-meeting series</p> <p>Develop a standard sales playbook for reps to follow</p> <p>Utilize automated sales 1:1 where applicable</p> <p>Continue nurture after conversion to ensure positive onboarding experience and open opportunity for upsell</p>



Path to Optimizing the Customer Journey



Thank **you!**

Any Questions?

