Customer Social Purpose Lifecycle Roadmap

Introduction

This exercise helps you embed your social purpose into customer touchpoints across the lifecycle - from pre-purchase awareness to post-purchase mobilization and beyond. Use it to set aspirations for customer engagement at a scale that fits your business.

Instructions

1. Review the following chart and **determine your preferred approach** to engaging your customers on your social purpose by checking Y or N. Note: Focus on future aspirations, not current state.

	Philanthropic	Y/N	Strategic	Y/N	Integrated	Y/N	Social Purpose	Y/N
Customer Role	We encourage customers to donate. • Desirable? Y/N		We encourage customers to volunteer. • Desirable? Y/N		We offer opportunities for customers to co-create and/or join our social purpose initiatives. • Desirable? Y/N		We are working on creating a customer movement around our company/brand and its social purpose. • Desirable? Y/N	
Brand Promise	**Quality**: Customers are aware our company donates money. • Desirable? Y/N		**Trust**: Customers are aware of how our company contributes to the community/society. • Desirable? Y/N		**Pride**: Customers are aware of our company's socially beneficial impacts and feel a sense of pride because of it. • Desirable? Y/N		**Meaning**: Customers believe society is better off if they do business with our company and that as customers, they are part of a social movement. • Desirable? Y/N	
Marketing	We buy advertising which tells our story. • Desirable? Y/N		Earned media/cause marketing tell our story. • Desirable? Y/N		Our customers tell our story. • Desirable? Y/N		Everything our company does tells our story. • Desirable? Y/N	

2. Review the list of potential goals below and **select /edit /adapt those that align with your reasons for embedding your social purpose into the customer experience**. Choose one or more of the following goals or make up your own, by answering the following. Once you have completed this, consider these findings and results when you complete the final question (#3).

We want to embed Social Purpose into the customer experience to:

- ☐ Demonstrate our commitment and build trust in our company
- ☐ Attract, keep, and delight customers
- ☐ Develop our customers to become brand advocates
- ☐ Engage our customers in helping us achieve our purpose
- ☐ Build a movement around our brand and our social purpose
- ☐ Demonstrate the value that comes from doing business with a purpose-led organization
- ☐ Drive retention and loyalty, as a bigger and closer customer community makes for a bigger impact
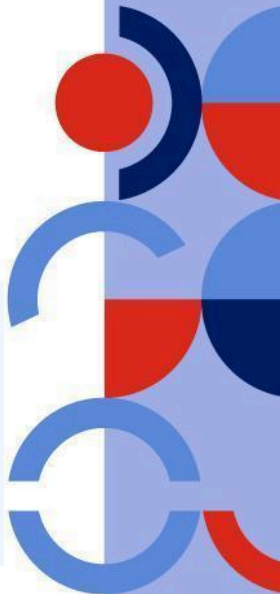- ☐ Other: List/describe

3. Using the Customer Lifecycle chart below and your prioritized goals from above, **identify how to enhance customer touchpoints to embed social purpose**.

Follow these steps:

- Edit the Customer Social Purpose Lifecycle chart to reflect your company (delete irrelevant items, add missing ones, include future plans)
- For each lifecycle stage, note 1-2 simple actions, responsible person, and timeline (3/6/12 months or 1-2 years).
- Where relevant, note how you'll measure success (e.g., purpose perception questions in surveys).

This becomes your Customer Purpose Lifecycle Roadmap.

Something to think about: As you build out your customer social purpose value proposition, you may want to imagine a future where you have two types of customers. Type 1 is a conventional customer and Type 2 is a customer that is not (yet) buying your products but is interested in joining your social purpose ecosystem or movement. They could sign on and join your social purpose community and collaborate with you in achieving your purpose and perhaps become paying customers at a future point. Your customers could even be customers of your social purpose, and not simply the customers of your products and services. Expand your lens of what is possible as you complete this exercise and be prepared to stand out from your competitors and surprise your customers and partners.

Customer Social Purpose Lifecycle

Pre-Purchase	Purchase	Post-Purchase	Mobilization
- Advertising: - TV - Radio - Print - OOH (Out of Home) - Digital - Case studies - Customer relationship management (CRM) - Cold emailing - Direct Mail - Displays - Sales decks - Email/email signature - Events/activations - Logo - Press release, media kits - Promotions - Social media - Testimonials: - Word of mouth - Peer referral - Product reviews - Video - Sponsorships - Trade shows - Website search: - Search engine optimization - Search engine marketing - Other	- App - Catalogue - Checkout - Delivery - eCommerce Platform - Employees - Events/activations - Gift cards - Invoice - Owner manuals - Packaging - Physical environment (store, facilities, office, parking lot) - Point of purchase/sale displays - Product or service - Salesperson (customer service) - Stationery, business card - Uniform, T-shirts - Website (about us, company history, purpose micro-site, etc.) - Swag/promotional products - Confirmation messages - Customer relations - Other	- Feedback surveys - Events/activations/signage - Loyalty program - Marketing email/CRM (up-selling/cross-selling – follow up contact to generate more business) - VIP programs - Newsletter - Product/customer support - Receipt - Reverse logistics (product and materials return) - Thank you note/letter/email - Regular communications, annual/milestone message - Disclosure of purpose performance/progress on website or in annual report/ impact report - Other	- Events/activations/signage - Customer community - Customer investors - Crowd-sourced innovations - Sales channel partners - Purpose projects to help customers understand our purpose by collaborating with us - Customer participation in long-term social purpose collaboration - Other
List the actions you will take to embed your purpose into the customer social purpose Life Cycle			
Action: By When: Who: How measured (e.g. purpose score, engagement rate):			