

THE
ULTIMATE
MARKETING
ENGINE



5 STEPS to Ridiculously
Consistent **Growth**

JOHN JANTSCH

Author of *Duct Tape Marketing*

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I dedicate this work to all of those amazing entrepreneurs who show up every day, persevere, resolve, commit, learn, teach, fall down, get up, and generally just try to keep this big old goofy world spinning one more day.

You've taught me so much and delivered joy and professional purpose to my life.



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PROLOGUE

Some Meaningful Way

“Can there not be government in which majorities do not virtually decide right and wrong, but conscience?”

—HENRY DAVID THOREAU

It was about 8:00 p.m. mountain standard time on a Wednesday when I received a text from a customer in the Midwest. I know a lot of businesspeople get late-night and even weekend texts and phone calls from customers, but I had never received one from Charlie, so this was kind of a big deal.

His text contained a long draft of an email he planned to send the next morning to his list of clients and a slightly altered version meant for his team of about fifty employees. I had provided marketing strategy and advice for this organization for a number of years. Now Charlie was asking me to weigh in on the content and timing of his proposed email.

The tone of the note was somber. The news, plain and simple, was something nobody wants to hear: that morning, Kansas City Mayor Quinton Lucas announced the first of its kind



shelter-in-place order, essentially a total lock-down on all but essential businesses.

Of course, this phenomenon was occurring all over the world due to the global pandemic of 2020. But addressing it at that moment presented unfamiliar ground for the millions of small businesses and individuals facing it.

That same day the NBA paused its season, the World Health Organization declared the disease a global pandemic, the Dow fell 1,465 points, and beloved actor Tom Hanks and his wife Rita Wilson announced that they had tested positive for the virus.

Charlie's home remodeling company had decided to reach out and communicate that they felt the best course of action was to halt all projects immediately and follow all precautionary measures in an effort to be prudent in the face of so many unknowns.

The potential cost of shutting down the business was huge, but as the lyrics of the popular song by the Fray suggest, "Sometimes the hardest thing and the right thing are the same."

After making a few alterations to Charlie's proposed memo in an effort to "lighten" the tone just a bit, we agreed that the message would go out first thing Monday morning.

At the same time millions and millions of small business owners were contemplating their fate and attempting to chart a course of action. Livelihoods were at stake. Making tough decisions, even when they are logical decisions, is hard for a business owner in the best of times. Suddenly it got a lot harder.

As we know now, many small businesses were wiped out by the effects of the pandemic, often through no fault of their own. Yet, many survived, rebuilt, and even thrived.

While some industries were no match for COVID-19, the pandemic also exposed a fundamental and often forgotten truth about business: *in good times growth often comes from being in the right place at the right time; in tough times, growth comes from being important in some meaningful way in the lives of your customers.*

The local bakery is important because it provides a place of warmth, the promise of sustenance, and the smell of baking bread. The local accountant is important because only she can reassure her clients that things are going to be okay. Not perfect, but okay.

A business is important to its customers when those customers realize that their lives would be diminished were the business to cease to exist.

When Monday morning arrived, Charlie hit the send button. Within moments replies rolled in from employees and current and past customers. Employees, many of whom were dealing with their own personal sense of uncertainty, supported the move. Customers also overwhelmingly supported the difficult decision and applauded the owners for making it.

Beyond assurances of loyalty, customers expressed concern for the organization as a whole. Some vowed to do whatever they could to support the business. Not a single project, even those that had now come to a sudden halt, was cancelled.

Eventually, as some semblance of normalcy returned, the organization found its way back to serving its customers. The backlog of projects from the ones who stuck with them made up for the months of standing by.

This small business had built a marketing engine that provided an understanding of what success looked like to their ideal customers. That understanding helped them instinctively choose a moment of complete uncertainty to get even

closer to their customers when it mattered most.

The lesson here is that doing what seems like the right thing during a rough patch is always the right thing from a marketing perspective.

During most of 2020 and into 2021 you saw article after article proclaim the strategies needed to market during a pandemic. Most of them boiled down to some version of “stop taking your customers for granted and stop spamming people.”

When has that ever not been good advice?

Good marketing that delivers value to those who are trying to solve a problem is always in season. And it always arrives from the customer’s point of view.

Don’t misunderstand: this is not about the customer always being right. This is about being relevant in a customer’s life, about changing the context of how they view your business or industry. It’s about making every other business irrelevant in their eyes.

In this book I am going to ask you to rethink how you view your current and future customer, how you view marketing, and how you choose who you work with. Ultimately you will get the chance to dump most everything you have been told about how to build your business. You will see that there is an entirely fresh perspective available, steeped not in what you see everyone else doing, but in what is in your heart, what serves your grand purpose, and what creates the greatest value for those you choose to call customers.

Use the worksheets, workshops, and action steps found throughout this book and online at theultimatemarketingengine.com/resources and feel free to reach out to me at john@ducttapemarketing.com if you would like to share or discuss your progress.

THE
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ONE

Tune the Engine—Step 0

“All the tools and engines on earth are only extensions of man’s limbs and senses.” —RALPH WALDO EMERSON

What is the Ultimate Marketing Engine?

I’m guessing you’re reading this book because you have at least a mild interest in the answer to that question, so I won’t hold back.

The Ultimate Marketing Engine is a successful customer.

Now, you may be thinking, “*Duh, everyone knows that you need customers. After all that’s pretty much what every other marketing book says. The customer is king, blah, blah, blah.*”

But I am going to show how most every other marketing book (including a couple I’ve written) gets this idea terribly wrong.

The school of thought that says the purpose of a business is to profitably acquire and retain customers is not entirely wrong. It’s just limiting and hard to sustain.



The Purpose of a Business

What if the purpose of a business was to discover what it takes to make your customer successful? What if then you concentrated all of your efforts on that goal for an ever-expanding roster of ideal customers? What if growth came with your customers, not from them?

Note that my answer to the question, “What is the Ultimate Marketing Engine?” includes not just the word “customer” but “*successful* customer.”

“Successful” may seem like a nice adjective, thrown in to flower up the writing. But it is much more than that. Think about what it takes to help a customer succeed and the key distinction comes to life. Your business succeeds when your customer succeeds.



Not Every Customer is Ideal

But here’s the thing you must grasp right now: you can’t make every customer successful. It doesn’t matter that you think everyone needs what you have to sell. Ideal customers have the right set of problems, the right circumstances, the right characteristics, the right motivation, the right beliefs, the right behavior, and the right amount of money.

What does *right* mean? Let’s determine that.

The key is to recognize the value that you, your products, and your services bring; to appreciate what an ideal client looks like; and then to understand and promise to solve that ideal customer’s greatest problem. Creating a marketing engine means helping your customers go from where they are

now to where they want to arrive, to experience the transformation they seek, and to get the best result possible.

Too much is written on the marketing tactic of the week, the next new platform, and how to get more likes, shares, hearts, or the emoji du jour. Tactics are nice. Clicks, phone calls, appointments, links, shares, and orders are all good. But without a solid *customer success strategy*, you are cruising down the road in a car without a gas gauge and you have no idea where the next service station is located.

Don't get me wrong, plenty of businesses succeed selling more each year, delivering what they promise at a fair price, and building a brand that people can trust. They create products and experiences so innovative that people flock to them, raving like starstruck fans.

Yet according to the Small Business Administration, about 627,000 new businesses open in the United States each year. In that same time period about 595,000 close.

Marketing is not solely to blame for a business's success or failure. There is plenty of credit or blame to go around, but it is safe to say that businesses dedicated to helping customers realize their dreams and desires are more likely to be the ones that people simply can't stop talking about.

In this book I am going to take you on a marketing journey. But we won't travel the same old road you have been down before. Rather, I plan to push you to think about marketing from an entirely new point of view that allows you to create ridiculously consistent growth.

Ironically, by focusing your attention on the growth of customer success rather than the growth of revenue, you will ultimately come to experience revenue growth like never before.

The 5 Steps Outlined

And now I present a brief overview of the “5 steps to ridiculously consistent growth” (see Figure 1) mentioned in the subtitle of this book. Our deep exploration of each step in the subsequent chapters will reveal both the strategic reasons behind the step as well as its practical application.



FIGURE 1

STEP 1. Map where your best customers are today and where they want to go.

In this step, I reveal the “Customers as Members” point of view. This concept will take us deeply into two mapping processes I refer to as the Marketing Hourglass and the Customer Success Track. These innovative processes will help you better understand what it takes to deliver success to your customers and how to ensure you do just that.

This crucial first step sets the table for everything that follows. Implementation of this step requires traveling through chapters 2 through 5.

Oh, and as a giant bonus this step will also make your business more profitable, more stable, and more efficient.

STEP 2. Uncover the real problem you solve for your ideal customers (the transformation they are seeking.)

People don't buy products or services just because they want them. They buy them because they believe they will solve a problem. They get to define what that problem is, but in this step, we will explore how businesses that understand, communicate, and promise to solve the real problem their ideal customers are trying to solve can indeed change the context of how their particular business is viewed and ultimately make the competition irrelevant.

This idea is fully revealed in chapter 6.

STEP 3. Narrow your focus to the top 20 percent of your ideal customers.

There are plenty of customers to go around; you don't need them all. In this step, we will work on understanding who and what makes a perfect customer for your business. Then we will go to work on helping them understand why your business is the only logical solution for them to consider.

You'll encounter the details and action items for this step in chapter 7.

STEP 4. Attract more ideal customers with the narrative they are already telling themselves.

When you know exactly where your customers are and where they want to go, you map the milestones that will get them there and grasp the problems they are trying to solve. You will be able to attract even more ideal customers because you know the story they are telling themselves.

This stage of the journey is covered in chapter 8.

STEP 5. Scale with your customers by serving their entire ecosystem.

Once you have put steps 1 through 4 into place, you will have built the framework that allows you to grow *with* your customers. This is the key to long term, sustainable growth because expansion comes organically rather than through the discovery of some new sales tactic or marketing channel.

This step is outlined in the final chapters, 9 and 10.

You may find it useful to source the worksheets, workshops, and action steps found throughout this book and online at theultimatemarketingengine.com/resources. I also invite you to reach out to me at john@ducttapemarketing.com. I would love to hear about and discuss your progress.



TWO

Where Your Best Customers Want to Go—Step 1

“Never has there been a map, however carefully executed to detail and scale, which carried its owner over even one inch of ground.” —OG MANDINO

The customer journey is a well-accepted concept in marketing circles. The idea is that if a company can figure out how a customer buys, how they make buying decisions, what they expect from the companies they buy from, and what keeps them coming back for more, then they can create marketing campaigns, messages, and processes designed to guide this journey in a way that creates growth and stability.

A customer’s journey passes through stages with names like “awareness,” “interest,” “consideration,” “intent,” “purchase,” and so on. And it leads to shapes and graphics that display the journey as a funnel that increasingly narrows toward a purchase.



Though this has long been an accepted approach, you will soon see that it is the wrong approach, or at least a terribly limiting one.

Here's why.

In mapping the traditional customer journey, most businesses and marketers consider only what is effective for the company, not the customer.

Some time ago I set out to reframe the traditional funnel-like journey because I've always felt that the secret to long-term marketing success is referrals, not leads. (I wrote about this idea both in *Duct Tape Marketing* and *The Referral Engine*.) In fact, to my way of thinking, referrals are the ultimate measure of marketing success—more so than customers. (The two are certainly related but referrals provide a multiplier spark to all things marketing.)



The Marketing Hourglass is Born

This thinking led to the creation of what I call the Marketing Hourglass. To illustrate what happens after someone becomes a customer, think not of a funnel but of an hourglass (a traditional funnel and an upside down funnel sitting on top of each other). With this shape in mind, the question becomes, “What would it take to turn every customer into a referral source?”

Further, this suggests a focus on behavior through a set of stages rather than action steps. The seven behaviors of the marketing hourglass are: *know, like, trust, try, buy, repeat, and refer*.

These seven behaviors represent logical stages of the customer journey as well as activities that customers want to

engage in as they decide whether or not to do business with an organization.

We want to know who can solve our problems. We want to like what they have to say. And we won't even consider buying from them if we don't trust that they will deliver. We often want the ability, if possible, to try what it might be like to work with this company or acquire their products.

A crucial side note: Most marketing is an attempt by a business to go from the know stage when they run an ad or post in LinkedIn, directly to the buy stage when customers come calling. Not only is this highly ineffective, but even if it works it sets you up for failure.

The primary purpose of the like, trust, and try phases is to educate your prospective customer on the value of doing business with you over others, on how your business is uniquely suited to solve their problems, on self-discovery of whether or not they are an ideal customer, and if so, why.

Ultimately the like, trust, and try phases help you weed out non-ideal customers and appeal to ideal ones who, because they now understand more about your value, are not as concerned about working solely with the lowest price offer.

And now, back to the hourglass stages.

We want the buying experience as well as the entire experience of working with a business to hold up to what was promised during the courting phase. We want to count on a solution and feel confident going back to this company over and over again rather than constantly looking for a new source.

Finally, as human beings we are wired to talk about and refer companies that surprise us and exceed our expectations.

These seven behaviors make up a solid list of human desires experienced throughout our relationship with the

companies we love. So, by building on the desire for trust, for example, a business would develop marketing campaigns, messages, and signals that conveyed this stage and triggered this desired behavior.

Instead of organizing demand for the consideration stage as in the traditional funnel journey, a business can organize behavior by appealing to the prospective customer's desire to know that this is a business they can trust.

It may seem like semantics, but the hourglass stages actually force us to pay more attention to what the customer is trying to achieve and less to what our business is trying to achieve.

This important distinction is at the heart of The Ultimate Marketing Engine.

I'm introducing the idea here, but don't worry: in chapter 3 there is more information and practice steps for creating the Marketing Hourglass.

Customer Experience as Department

Over the past decade or so, the concept of customer experience has eclipsed the simple idea of customer service.

This is mostly due to the fact that the greatest change in marketing is the way our customers buy. The customer has access to everything that anyone says about an organization through review sites, online forums, social platforms, and entire YouTube channels dedicated to showcasing bad experiences.

There is no way to escape the collective opinion of everyone who has come into contact with your brand. This includes terribly happy customers along with your Aunt Betty's second cousin Vinnie's ex-girlfriend who angrily blogs about your

company although she has never actually purchased anything from you.

And so, creating the most positive customer experience has grown in importance as an essential aspect of the customer journey.

A Big Win for Customers

Entire books and practices are now dedicated to this topic. Jay Baer's *Hug Your Haters* and Joey Coleman's *Never Lose a Customer Again* are examples of important deep dives into the topic of customer experience.

Creating elegant new customer onboarding experiences, overdelivering on your promises, surprising customers with thoughtful and personal gifts of appreciation (no, not a coffee mug with your logo on it) are just a few of the practices that many organizations now routinely bake into the customer journey.

Thankfully many organizations have grown to realize that consistently delivering a great customer experience requires building an internal culture of service wired to deliver an experience that wows customers over and over again.

While this approach has led many businesses to advance their goals in acquiring and retaining loyal customers, I would like to suggest it's still not enough.

Organizations that adhere to the practice of building and guiding a great customer journey move their customers through the stages, but often ignore the ultimate promise of a customer relationship. The customer is attracted then converted, and the agreed upon goods and services are delivered in a pleasing manner. End of the story. Transaction completed.

Now, I'm not suggesting that practitioners of this proven and effective way of attracting and serving their clients are doing anything evil (well, maybe some are). I'm simply suggesting they aren't doing anything close to what's possible.

Fully embracing your marketing engine requires a major shift in how you think about marketing and, frankly, about customers.

Customers as Members

The shift I'm suggesting asks you to reframe the customer journey less as a company process and more as a customer process.

The clothing brand Members Only became somewhat of a cultural sensation back in the '80s. The tagline for the company's line of apparel is, "*When you put it on, something happens.*" Yes, I had a Members Only jacket, I admit it.

What if you could come to think about your customers, clients, patients, or whatever you call them as *members*?

Please know right off the bat that I am not suggesting you create a membership aspect to your business. It might be a great model for you, but that is not my point. I'm suggesting that you think this way about your customers because *the main reason someone seeks to be a member is fundamentally different from the main reason they seek to be a customer.*

If every organization adopted this thinking it would change how they innovate, iterate, and support every aspect of their business.

In a stable membership relationship, the goal is to help every member get the transformation they are seeking, not the product you are selling. The difference can be staggering.

What if you actually cared more about your customers' transformation than about your own transaction?

Now I'm not suggesting that you don't already care about results for your customers. I am suggesting that you could build your business around that concept from the ground up.

Let me be clear here before we go deeper into this "customers as members" idea. It's not about creating a Facebook Group and adding a membership feel to your offerings. It's not about membership models you're familiar with, like Costco or Amazon Prime, which you join so you can get a better deal. It's about shifting your point of view

This is not about the typical extrinsic rewards that often accompany a membership program and confer a sense of entitlement. It is not about free parking, product perks, branded merchandise, or special event invitations.

It is a point of view more closely aligned with the intrinsic rewards people often associate as part of their involvement with any mission-driven organization.

Again, I am not talking about true membership, but about a sense of belonging that comes from a relationship that's built on engagement, investment, and evangelism rather than transaction.

In the point of view I am proposing, the customer is not sold or even offered a membership; they simply are transformed into members.

TOLO as a Point of View

I was listening to a podcast as I was writing this book. One of the features of this show is questions and comments from listeners. During this particular episode, Howard, a teacher from

Hillsborough New Jersey, described the common expression YOLO (“you only live once”) in the context of a question: If you knew you only had a week to live, what would you do, what would you change, how would you live that last week?

Howard went on to comment that as a high school teacher, he hears his students invoke YOLO as an excuse for doing something that is somewhere between foolish and brave. Then he mentioned that he often challenges his students to turn this concept around to something he calls “TOLO” (*they* only live once.)

What if you knew it was someone else’s last week, but they didn’t know, and you couldn’t reveal it? In this case, that person, whoever they are, only lives once.

How would you treat that person?

Let’s apply this to customer relationships for a moment. I know it may seem a bit personal and maybe even overboard, but doesn’t it cause an immediate shift in posture for you? Could you adopt TOLO as a way to think about the transformation your customers are seeking?

How far you take TOLO is up to you, but it could make a good mantra for your decision-making process as you consider the shift I suggest throughout this book.

The Difference Between Customers and Members

In order to get some traction for this notion, let’s explore a number of key differences between a traditional member relationship and a traditional customer relationship.

ENGAGE VS. TRANSACT

A membership relationship generally involves a higher level of engagement, while a customer relationship typically is thought of in terms of transactions.

Firms that naturally stimulate engagement, even in the form of social media contests, often experience a higher level of loyalty and word of mouth sharing. Engagement leads to loyalty and repeat business. Transactional relationships are more sensitive to price considerations.

Think about that coffee punch card in your wallet or the local garden center's annual member dividend that is good toward the purchase of a Christmas tree in December. Both are forms of loyalty building, which leads to a more member-like experience.

Many people are familiar with the outdoor goods retailer REI. REI is a pioneer in the customers as members movement. Their business model is built on the membership or co-op approach.

I am not suggesting that this is necessarily a model for you. I am saying that what makes REI tick is the shared values of its members and their engagement with the company and with other members.

INVEST VS. PURCHASE

I think the difference can be highlighted through the well-worn financial distinction between an investor and a trader. An investor is someone who takes a long-term buy and hold approach based on a strategy for the future. A trader is trying to beat the market, work a hunch, or gain a price edge.

It's the difference between a customer who sees what you sell as a cost vs. an investment. Which sounds like a more ideal long-term customer for your business?

EVANGELIZE VS. REFER

Perhaps a fictitious conversation can best illustrate this difference.

Problem: “Know anyone who is really good at fixing the speed of my website?”

Refer: “I used this company. They seemed pretty good.”

Evangelize: “Dude, don’t even think about it. Call up this company and it’s done. They are so great, they keep checking on our site and making suggestions, and I’ve learned so much from the emails they continue to send me.”

Silly example, I know, but you get the difference, right?

Which sentiment would you want shared about your business?

A Membership Point of View

Before we move on, please do not confuse the concept of membership I have presented with the common membership business model. I may be belaboring this point, but I don’t want to run the risk of you dismissing the idea due to bias about the term I’ve chosen to use.

While this point of view is not about actual membership, it does include a potent principle of gamification: the concept of applying rules to winning.

In order to view your customers as members, you will have to ask yourself some hard (or at least different) questions as you ponder the notions of engagement, investment, and evangelism.

In a moment you are going to encounter the concept of a *customer success journey*.

To create your marketing engine, you will be asked to design an entirely new aspect of the customer journey, one that emphasizes customer transformation and results over all else.

Introducing the Customer Success Track

In addition to the stages of the Marketing Hourglass introduced in this chapter, I am going to ask you to overlay another new element of the customer journey called the *Customer Success Track (CST)*. **Note:** You may prefer **Client Success Track** but know that I am using the terms interchangeably throughout this book.

I have intentionally chosen the word “track” because it is dynamic and cannot be confused with a “stage.” In fact, elements of the CST will undoubtedly cross into numerous stages of the Hourglass.

The concept behind developing the CST is that you go to work on understanding the transformation that your customers want to make when they buy your product or engage your services. Ultimately you are gauging where they are and where they want to go. But rather than simply making and delivering on your promise, you monitor and measure their progress based on the success track you design.

This not only changes the perspective from the business to the customer, but it also allows you to build the ultimate process for delivering the transformation your customers desire.

In order to develop a CST for your business I’ll ask you to consider five elemental questions. (Please note that in this chapter I am simply introducing the idea; we will go to work on it in chapters 4 and 5.)

1 Where are our best customers now in terms of the results they want?

No two customers are exactly alike. To answer this question, think in terms of stages. With a firm grasp of your success stage you can determine an approach and metric for starting your work based on understanding where a particular customer currently fits into your solution.

A start-up business or a young newly married couple are examples of customers at a certain stage of need for your products or services, whereas a growing and already profitable business or a couple nearing retirement would fall into a different stage of need.

In my consulting practice we use five stages to determine the baseline and the progress of our small business customers with respect to what we call their marketing maturity. The five stages are Foundation, Level-up, Organize, Stabilize, and Scale.

The notion of maturity applies to the movement from stage to stage, almost like you think of human maturity. Each stage comes with defining elements, milestones, and expectations.

The ultimate goal of course is to advance a customer through all five stages over the course of a long-term business relationship.

2 What are the defining characteristics of our customers in each of these stages?

The stages are more than just clever names we came up with. They relate to a set of characteristics we can use to help us recognize the current stage of a customer's "marketing maturity." For example, we may recognize certain demographics,

such as the age of the business, annual revenue, or number of employees.

Beyond those target market considerations, we can also analyze the state of things like their website, online presence, marketing message, and lead generation activity to help characterize where they are now relative to where they want to go.

Next, we'll make a list of the challenges they may experience at this stage. For example, they have a website, but it's not generating leads, or they generate leads but can't convert enough to customers.

Lastly, we consider the promise of moving through this stage. What will they now be able to do? What transformation will have occurred? Again, sticking with our marketing clients, moving from Foundation > Level-up generally means that their website content has been improved to the point where the sales team can now use it to create better lead generation opportunities.

So, each stage now has a defining set of characteristics, a list of challenges, and a promise when traveled through.

3 What milestones must our customers achieve to move to the next stage?

This is where the CST starts to pay dividends.

Once we have created the stages of customer success and defined the characteristics of each stage, we can start to pin down the milestones that each customer must achieve in order to move toward the next stage of success.

Milestones are accomplishments that can be stated as sets of questions with “yes” or “no” answers. Each set is related to core activities that a customer must achieve before moving on.

The beauty of this approach to defining customer success is that there is no gray area, no fumbling around about the value of your work or the progress a customer is making. It's either "Yes, this occurred," which means progress was made; or "No, this has not occurred," which means that the customer is not yet ready to proceed.

To facilitate progress, a milestone must be specific and not up for interpretation.

"Is the website effective?" would serve little purpose as a marketing milestone. But "Does the website display correctly on mobile devices?" is a yes-or-no question. Answer yes, the customer moves on to the next milestone. Answer no and you know what to fix next.

As I mentioned at the outset of this step, this is where the real payoff begins to show up. But be warned: this step requires work. Eventually, each stage of a completed success journey may contain hundreds of milestones. So while this should be seen as a long-term, ongoing process, it will also serve your business in many different ways.

In addition to helping you deliver transformative results for your customers, this list of milestones will make it far easier to train, delegate, and repeat your results as your team grows.

4 What activities, tasks, or action steps must we (or our customers) take to achieve each milestone?

The answer to this question could become the entire roadmap for working with your customer over the long-term. You should match each activity, task, or action step to the milestones developed in the previous question. This becomes a punch list of sorts for ensuring that a milestone is completed.

Documenting the activities in this step is how you ensure that your customer gets a result. But perhaps equally important is how you create a repeatable success process. It's the first step in creating a system that ensures you can also effectively delegate customer success. Don't underestimate the power of this idea. This is how you make a company less dependent on the founder or owner. This is how you scale an organization beyond its current state. This is how you make a company more attractive to a potential buyer.

5 What systems must we create to ensure passage through the stages of the success journey?

The beauty of this approach is that it keeps both you and your customers on a path that is based on transformation, that can be accurately measured, and that is all about results.

Some of the tasks that you outline in completing step 4 will be simple, such as checking a box, while others will be multi-disciplined, complex, and require outside expertise or collaborative customer involvement.

So, it might not be enough to write out a list of tasks. Each one may require a documented process that ensures anyone assigned to it will either know how to complete the task or can be trained to do so.

System creation is work, but in the case of customer success systems it is work that is well worth prioritizing. Make it as simple or as complex as you like. You can employ specific tools or methodologies, but the only good approach is one that you and your team will embrace.

Don't become overwhelmed trying to organize and document the hundreds of systems you may need to create. Start with your milestones and the tasks nested under each, and

then make an assessment and a list of what needs to be documented first.

Use the following filters to help create your priority list:

- How critical is the task to overall success?
- Who on your team owns the knowledge to document that task?
- Would documenting the task allow you to free up your time?
- Are you the only one who can complete the task?

Questions like these may help you conclude that a certain task is very important to overall success and that currently you are the only one who knows how to do it. That, in my mind, would be a high priority system to create.

Concentrate on building high priority systems and make sure there is someone in the organization who is in charge of the documentation process.

In the next three chapters we will dive into the workings of the Marketing Hourglass and CST as deeply as if you were attending a day-long workshop designed to guide you through these vital concepts.