

Mapping the customer journey for pest control companies

Section 1: Identify key touchpoints

Instructions: List all the critical points in the customer journey where feedback would be valuable. Think about major interactions customers have with your business.

See the example below:

Touchpoint	Description	Example interaction
Initial inquiry and consultation	When first-time customers inquire about services	Initial contact, first consultation
Appointment booking	When customers schedule their appointment	Online booking, phone call
Appointment reminder	How your business reminds customers of their upcoming service appointment	SMS, email, phone call
Treatment sessions	First visit for pest control treatments	The pest-control tech arrives in person at the location to administer pest-control
Post-treatment follow-up	The period immediately after a treatment is completed	Follow-up calls, checkup appointments
Ongoing services	Regular visits for preventive care	Check-ins

Billing and payments	The process of handling payments	Payment processing
Other (specify)		

Section 2: Align survey questions to the touchpoints you want to receive feedback on

Instructions: List all the critical points in the customer journey where feedback would be valuable. Think about major interactions customers have with your business. See the example below:

Note: In the interest of avoiding survey fatigue, you'd typically send one survey to collect the feedback you're looking for. This survey might include multiple survey question types.

Touchpoint	Survey type question	Example survey question
Initial inquiry and consultation	CSAT	"How satisfied were you with the first consultation?"
Appointment booking	CSAT	"How satisfied are you with the appointment booking process?"
Appointment reminder	CSAT	"How satisfied are you with the reminders you received about your appointment?"
Treatment sessions	CES	"How easy was it to understand and follow the treatment plan?"
Post-treatment follow-up	CSAT	"How satisfied are you with any follow-up?"

Ongoing care	Five-star	"How would you rate your recent pest control care?"
Billing and payments	CES	"How easy was it to handle your billing process?"
Other (specify)		

Section 3: Determine which touchpoints to cover in your first survey and any subsequent surveys

Instructions: Decide what touchpoints you want feedback on from your first survey and what you might collect feedback on later in the customer journey.

Example touchpoints you might want to collect feedback on and the timing buckets they fit into:

First 30 days survey	First 60 days survey	90 days + survey
<ul style="list-style-type: none"> • Appointment booking • Initial inquiry and consultation • Post-treatment follow-up • Billing and payment 	<ul style="list-style-type: none"> • Ongoing treatment 	<ul style="list-style-type: none"> • Ongoing treatment sessions • Check-ins • Reminders to schedule routine treatments

Section 4: Visualize the customer journey

Instructions: Create a visual representation of the customer journey with mapped survey points, frequency, and planned actions. Use the following table to draft your visualization.

Journey stage	Touchpoint	Survey type	Timing bucket	Actions/Analysis	Notes
Initial inquiry and consultation	Initial contact, first consultation	CSAT	First 30 days survey	<p>RACI: Dispatcher or scheduler as R for assessing initial consultation feedback.</p> <p>Analysis: Improve consultation process, address customer concerns.</p> <p>Communication: Report findings in monthly staff meetings.</p>	Get feedback on the initial inquiry and consultation experience
Appointment booking	Online booking, phone call	CSAT	First 30 days survey	<p>RACI: Assign R (Responsible) to the Reception team to analyze satisfaction.</p> <p>Analysis: Identify improvement areas, share feedback with the pest control manager (A-Accountable), and develop an action plan (C-Consulted).</p>	Capture satisfaction with the booking process

				<p>Communication: Share insights in a monthly review meeting (I-Informed).</p>	
<p>Appointment reminder</p>	<p>SMS, email, phone call</p>	<p>CSAT</p>	<p>First 30 days survey</p>	<p>RACI: Assign R (Responsible) to the Reception team to analyze satisfaction.</p> <p>Analysis: Identify improvement areas, share feedback with the practice manager (A-Accountable), and develop an action plan (C-Consulted).</p> <p>Communication: Share insights in a monthly review meeting (I-Informed).</p>	<p>Capture satisfaction with the booking reminder process</p>
<p>Treatment sessions</p>	<p>Pest control services, check-ins, etc.</p>	<p>CES</p>	<p>First 30 days survey</p>	<p>RACI: Treatment team as R for identifying friction points.</p> <p>Analysis: Enhance treatment process, track common issues.</p> <p>Communication: Weekly team meetings to discuss improvements.</p>	<p>Understand ease of treatment and communication</p>

Post-treatment follow-up	Follow-up calls	CSAT	First 60 days survey	<p>RACI: Follow-up care team as R to evaluate follow-up satisfaction.</p> <p>Analysis: Implement improvements based on feedback.</p> <p>Communication: Monthly operations review to discuss findings.</p>	Ensure satisfaction with follow-up care
Ongoing care	Regular checkups	Five-Star	90+ days survey	<p>RACI: Pest control tech R for monitoring ongoing care satisfaction.</p> <p>Analysis: Continuous improvement in patient care.</p> <p>Communication: Share results in biannual strategy sessions.</p>	Continuous monitoring of ongoing care satisfaction
Billing and payments	Payment processing	CES	First 30 days survey	<p>RACI: Billing team as R for assessing payment process ease.</p> <p>Analysis: Streamline billing and insurance processes.</p> <p>Communication: Monthly finance</p>	Feedback on the ease of billing

				review to discuss findings.	
Other (specify)					

Tips for completing the worksheet

- **Collaborate:** Involve team members from different departments (e.g., reception, dispatch, tech, billing) to get a comprehensive view of the customer journey.
- **Be specific:** Clearly define each touchpoint and ensure the survey questions are relevant and actionable.
- **Keep it simple:** Avoid overwhelming customers with too many surveys. Balance the need for feedback with the customer experience.
- **Iterate and improve:** Regularly review and update the journey map based on feedback and changing business needs.
- **RACI framework:** Utilize the RACI framework (Responsible, Accountable, Consulted, Informed) to ensure clear ownership and effective action on feedback.
- **Communication:** Establish a clear plan for sharing feedback insights with relevant stakeholders to drive changes based on the collected data.

Worksheet template: Mapping the customer journey for pest control companies

Now try filling it out for your own business:

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Ongoing services	Regular visits for preventive care	Check-ins
Billing and payments	The process of handling payments and insurance claims	Payment processing, insurance handling

Other (specify)		
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Section 2: Align survey questions to the touchpoints you want to receive feedback on

Instructions: List all the critical points in the customer journey where feedback would be valuable. Think about major interactions patients have with your business. See the example below:

Note: In the interest of avoiding survey fatigue, you'd typically send one survey to collect the feedback you're looking for. This survey might include multiple survey question types.

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Appointment reminder		
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Post-treatment follow-up		
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Billing and payments		

Other (specify)		
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First 30 days	First 60 days	90 days +

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Appointment reminder					

Treatment sessions					
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Billing and payments					

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