



The Customer Journey Mistake That's Killing Your Marketing ROI



№	NAME	BCSS	TOTAL	CATEGORY
1	Kovalenko	Rogach D	100	A
2	Lebedeva	Rogach D	98	A
3	Guraluk	Rogach D	98	A
4	Novak	Rogach D	8	A
5	Korkosh	Verenich I	8	A

ITME 1	ITME 2
350	140

Marisa Murgatroyd

Founder of Live Your Message



AS SEEN ON...





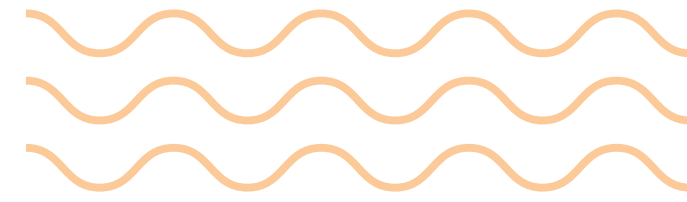
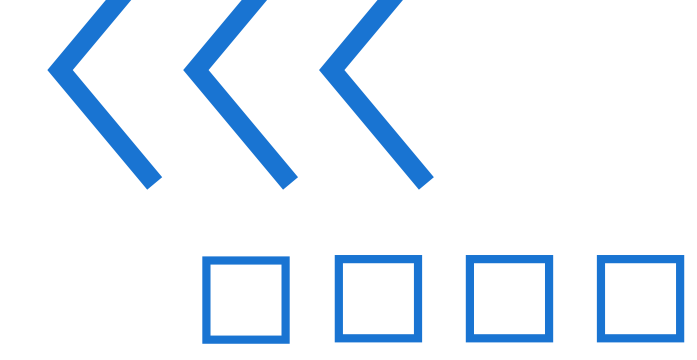
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Let's talk about YOUR Customer Journey...

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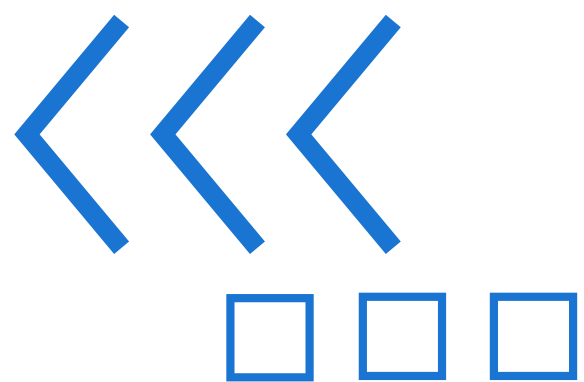
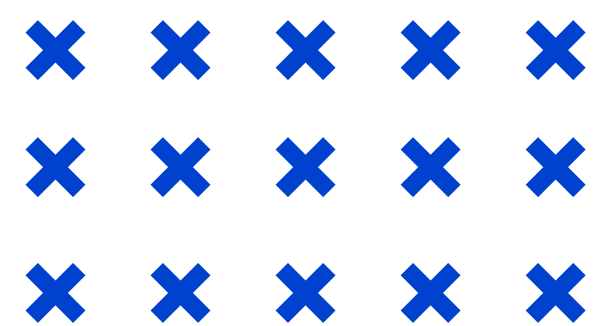
The **entire psychological experience**
a human being has with your brand



YOUR Customer Journey

determines whether a lead **converts**,
whether they onboard successfully and **stick**,
and whether they **ever** become profitable...

Because marketing ROI **isn't** calculated on
cost per lead, but on **cost per activation.**





32%

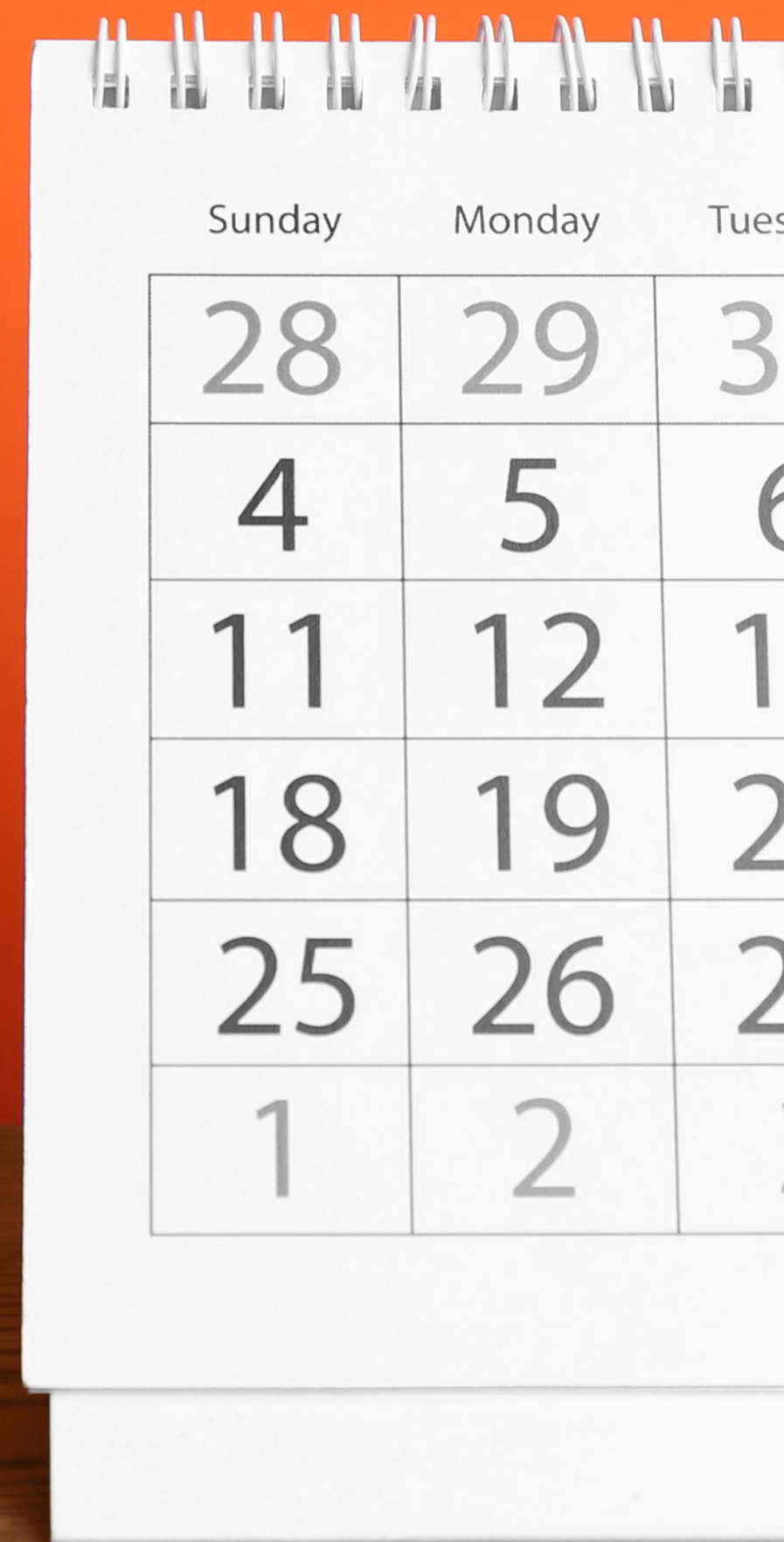
of customers will leave
after a single bad
experience



92%

will abandon a company
entirely after 2–3
negative interactions





Real marketing ROI
is decided by everything
that happens in the very
first hour, day and month
AFTER someone says
yes to you



Tell me...

How many of you have watched a cohort of newly acquired customers go quiet within the first 30 days and wondered what went wrong?



- ✓ Your marketing worked
- ✓ Your messaging converted
- ✓ Someone clicked “Get Started”
- ✓ They downloaded the app and perhaps created an account
- ✗ And then... they just stopped



Fintech Activation
Rates sit at just

5%

AGILE GROWTH LABS



76%

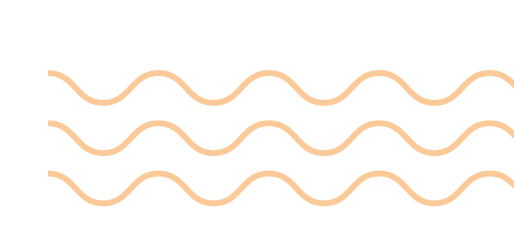
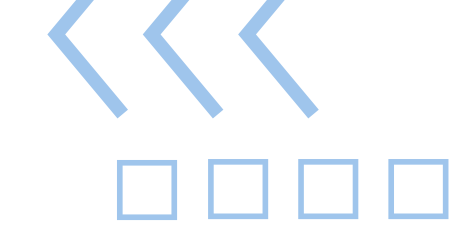
of Fintech users who
do convert do so
within the first 7 days

MIXPANEL



The Marketing Impact:

- If you're spending \$50 per acquisition and only 5% are still active at 30 days, your real cost per active customer is now \$1,000
- Move that activation rate to 15% and it drops to \$333
- Move it to 25% and it drops to \$200



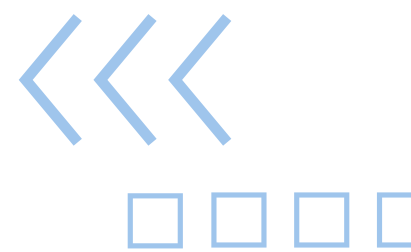
The 4 Phases of Every Customer Journey

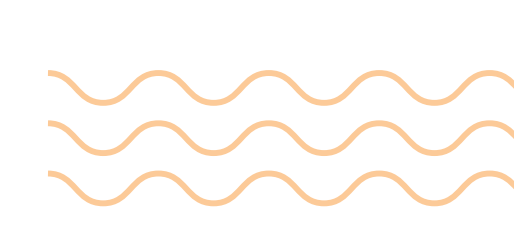
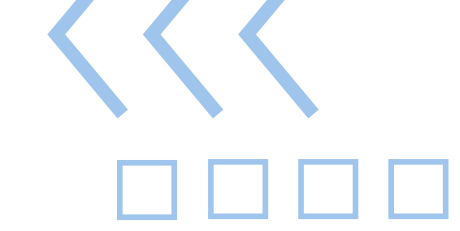
PHASE 1

PHASE 2

PHASE 3

PHASE 4





The 4 Phases of Every Customer Journey

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Discovery

This Phase is about getting noticed, building awareness, driving consideration and converting prospects.

PHASE 2

Onboarding

The moment someone says "yes." The goal is to get them to first value FAST, before doubt sets in. Every extra step between signup and "oh, I get it" is where people drop.

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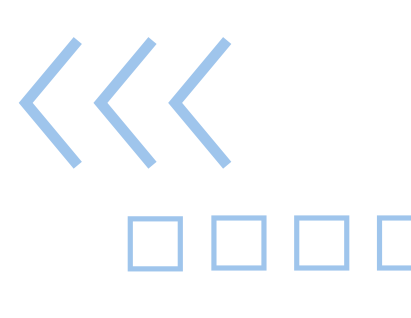
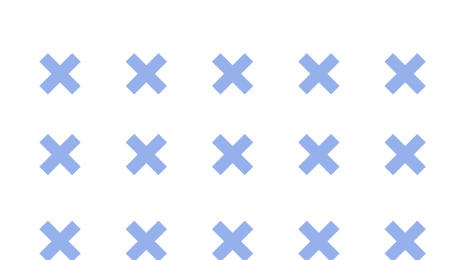
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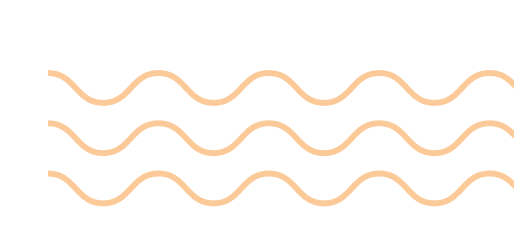
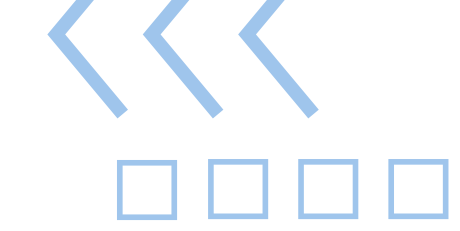
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Endgame

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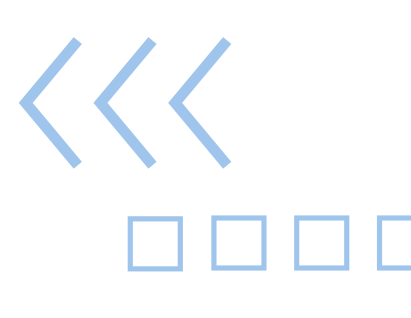
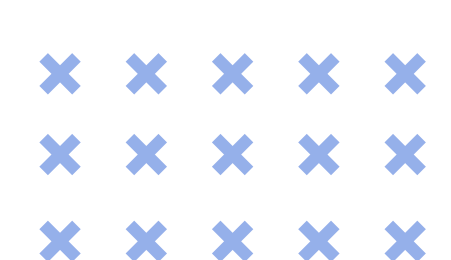
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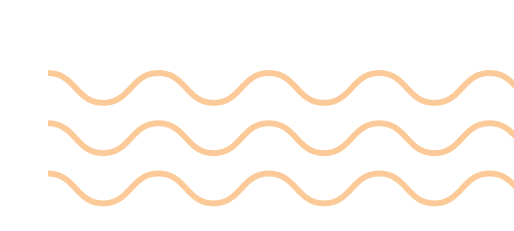
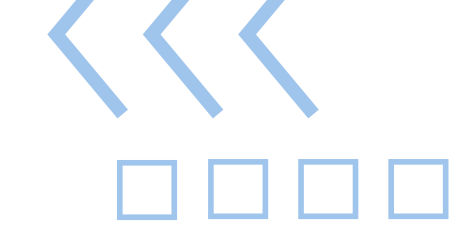
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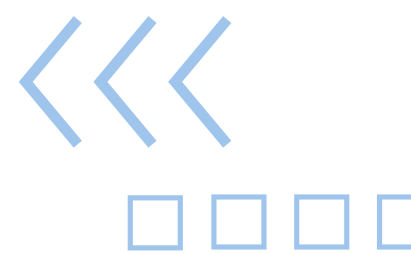
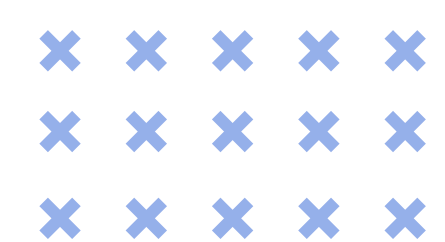
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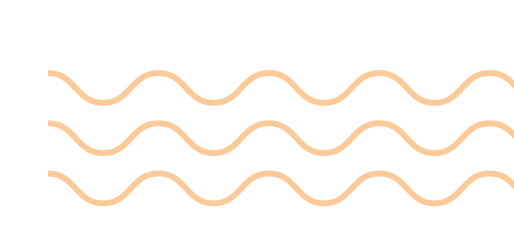
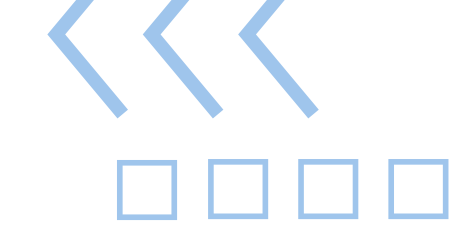
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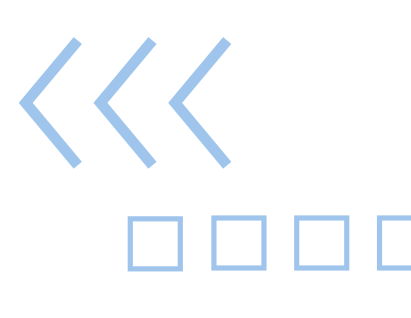
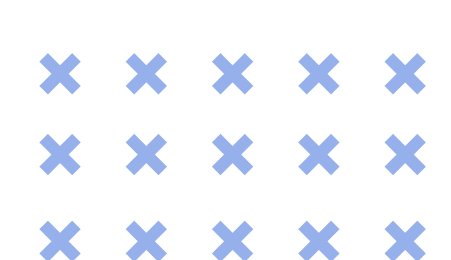
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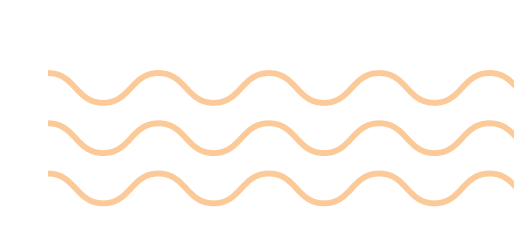
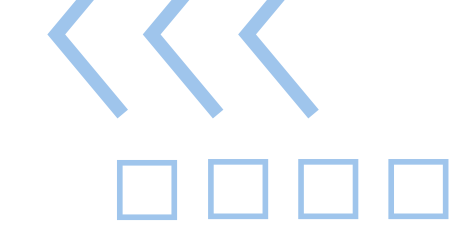
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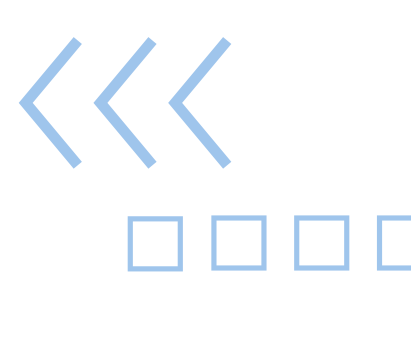
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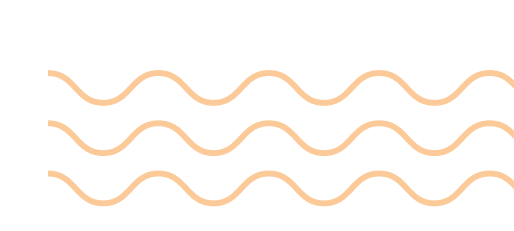
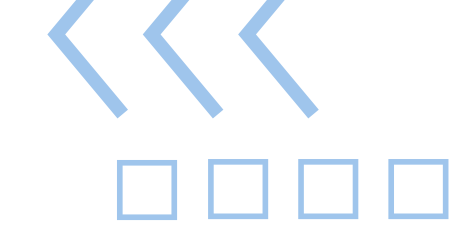
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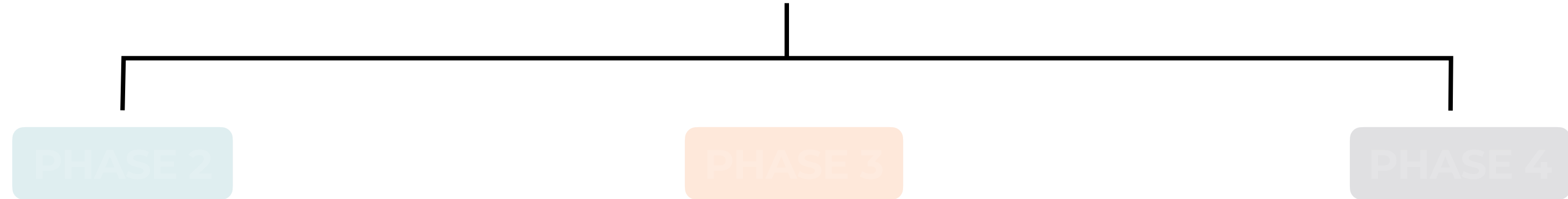
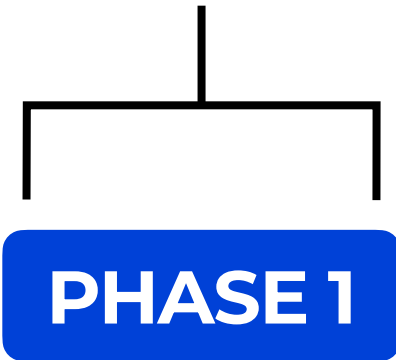
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Most organizations pour 80 to 90% of their resources into Discovery

The other three Phases are where customers quietly disappear and marketing dollars go to waste



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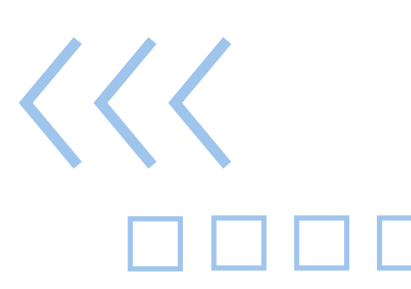
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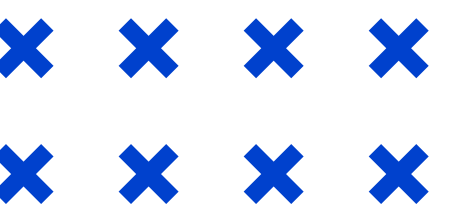
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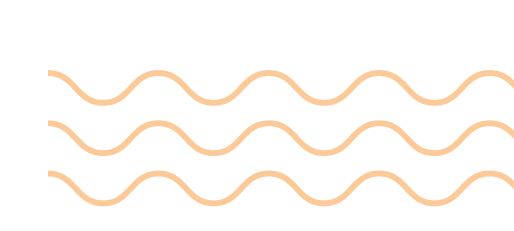
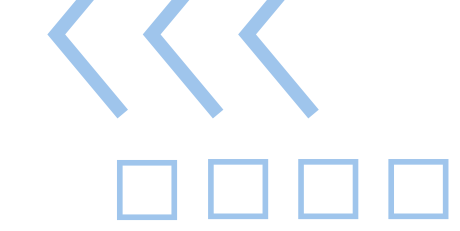




Bad Onboarding

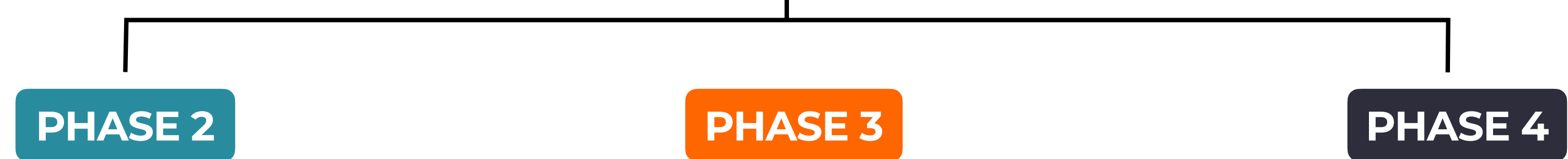
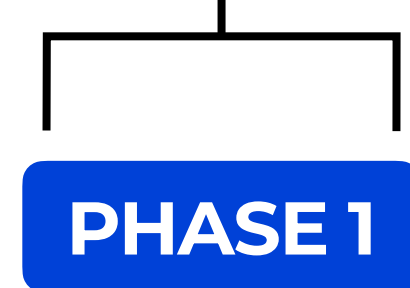
- The product asks for trust before earning any
- The first experience of value is gated behind a ton of compliance
- The signup flow has no recovery path when someone disengages
- The first session has no obvious "win" state so people don't know whether they're winning or not
- There's no roadmap so people know where they are in the onboarding process or how long it's going to take
- The product trains users to ignore it before it's earned their attention with premature notifications, generic re-engagement emails and so on
- The tone shifts from warm and human in marketing to cold and compliance-heavy in the product
- The user has no path to get to a human when they need help most





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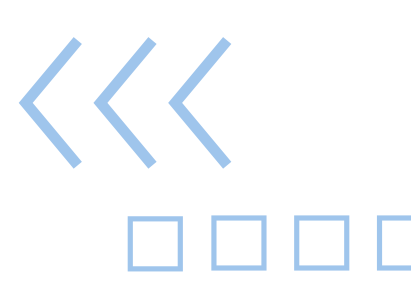
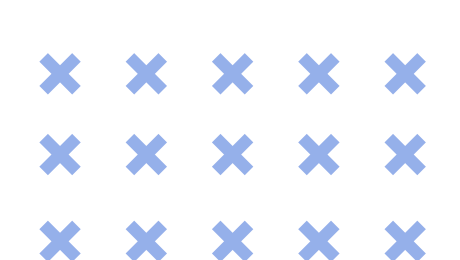
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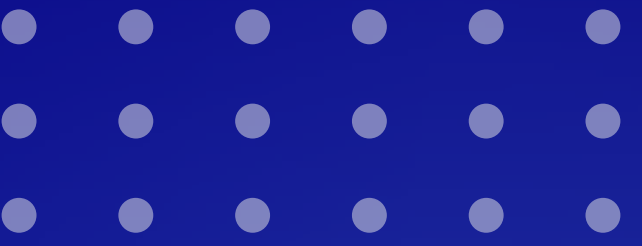
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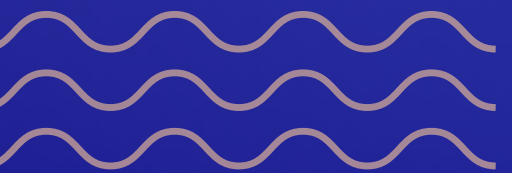
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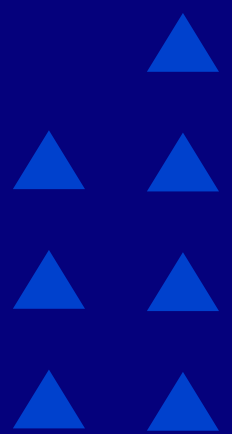


**Why does this keep
happening?**



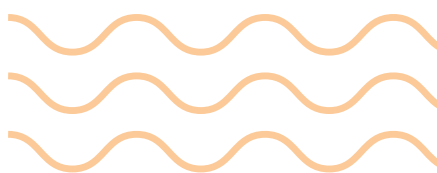



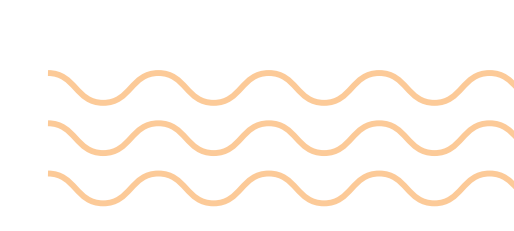
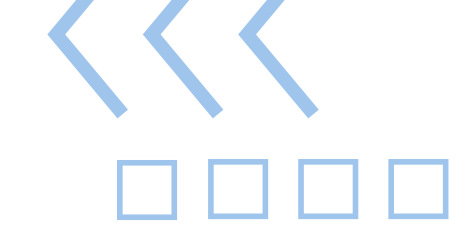
Function-Focused Design

- Optimizes around what the company needs from each interaction -- that might be conversion rates, ticket deflection, cost per transaction or call volume reduction.
 - Treats customers as units moving through a system and asks: *"How do we maximize throughput?"*
- 



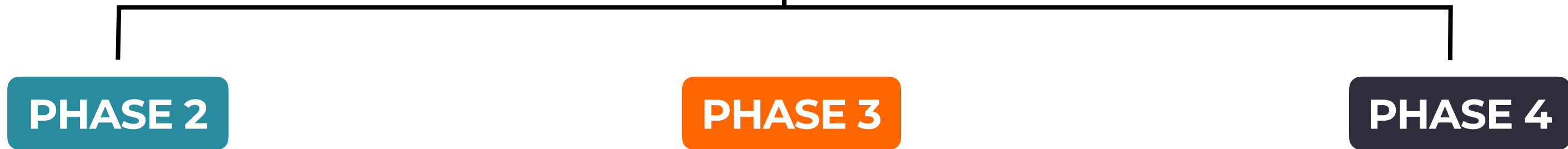
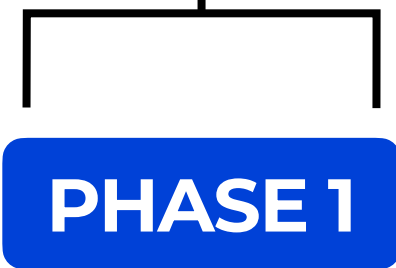
Human-Focused Design

- Optimizes for people -- their feelings, their motivations, their vulnerabilities AND their context.
 - Asks *"What does the person on the other end of this interaction need from THIS specific moment?"*
- 
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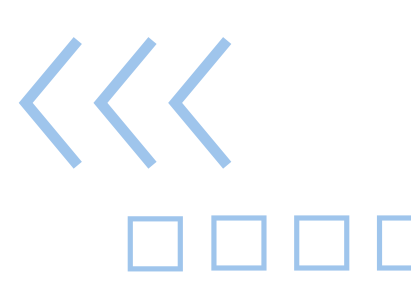
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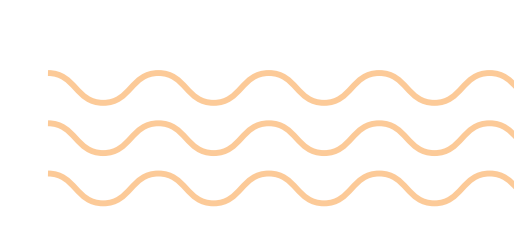
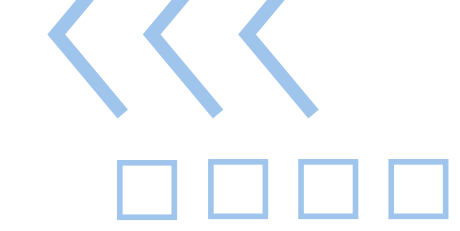


GAP

**FUNCTION
FOCUSED**

**HUMAN
FOCUSED**





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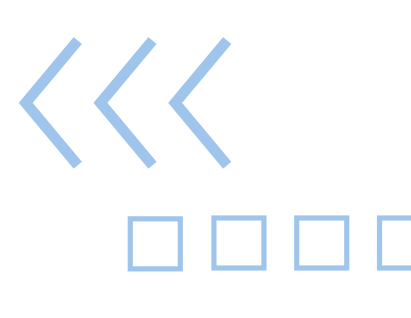
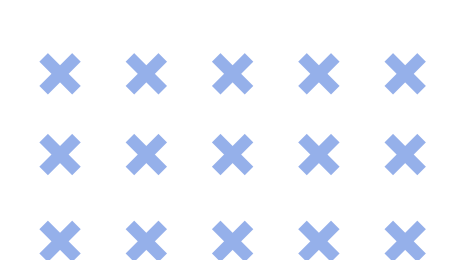
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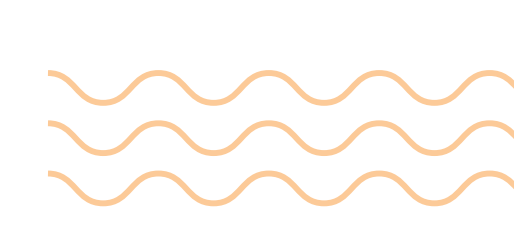
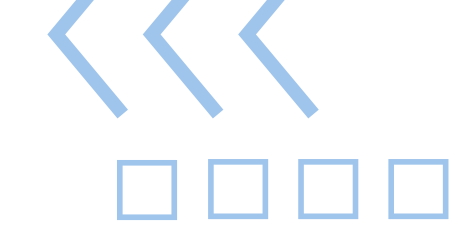
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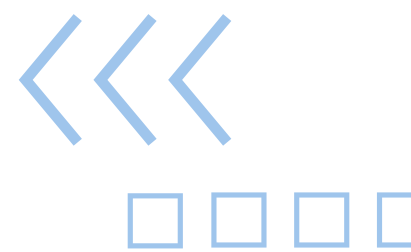
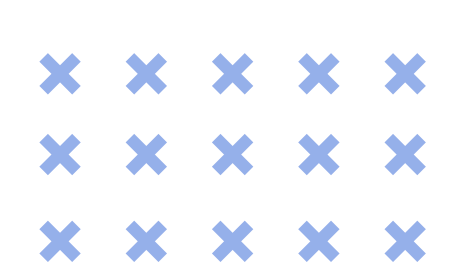
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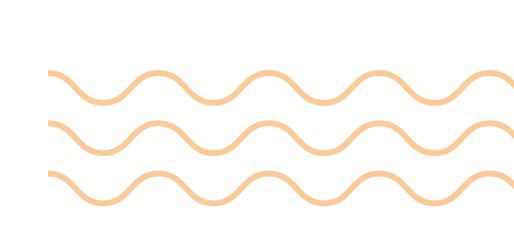
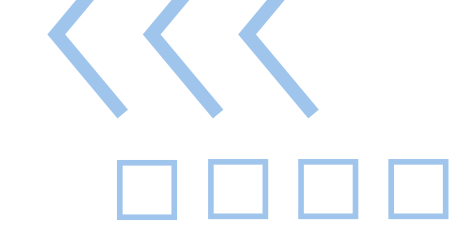
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- Function-Focused Design asks: *"How do we convert this visitor?"*
- While Human-Focused Design asks: *"Does this person trust that we understand them before we ask them to commit?"*
- The Function-Focused Team that built this is celebrating a 30% lift in click-through.
- Meanwhile, a Human-Focused Approach knows that the customer is probably asking: *"How do you know my income range? And if you know that already, what else do you know? And do I want to give you any more?"*





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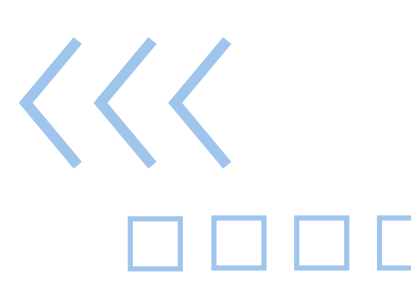
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- In Fintech and Financial Services, a Function-Focused Approach asks: *"How do we get them verified and compliant?"*
- But a Human-Focused Approach will ask: *"How do we give them a fast 'win' so they feel confident they made the right decision?"*



Shine Case Study

Step 1:

Enter your
company
name



Step 2:

App autofills
company
data from
public
database



Step 3:

Customer
lands inside
the App
before full
KYC is
complete



Shine's First Win

Step 1:

Enter your company name

Step 2: Result:

App autofills company data from public database

Step 3:

Customer lands inside the App before full KYC is complete

A 545% increase in Onboarding Conversion Rate, from the industry average of 15% to around 80%

Niyo Case Study

The issue:

Users begin to abandon KYC

Identify:

Behavioral analytics identifies the moment this is happening

Respond:

Contextual nudges like prompts, notifications and support outreach are triggered

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The issue:

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A 23% increase in Day 7 retention without changing the underlying KYC requirements at all

Identify: **Result:**

Behavioral analytics identifies the moment this is happening

Respond:

Contextual nudges like reminders, notifications and support outreach are triggered



Titan Case Study:

From **31%** to **78%** Onboarding Completion

Customer Acquisition Cost dropped **35%**

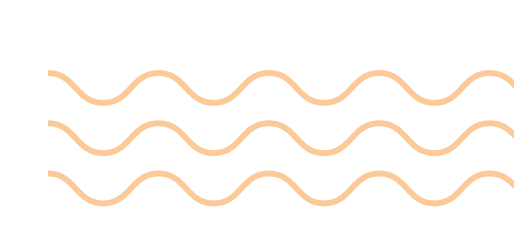
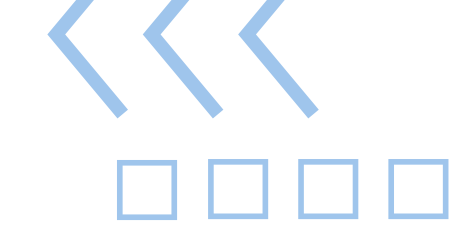
-- leading to \$58 million in Series B funding





Progressive Disclosure:

Let the product earn the right to ask for more



The 4 Phases of Every Customer Journey

PHASE 1

Discovery

This Phase is about getting noticed, building awareness, driving consideration and converting prospects.

PHASE 2

Onboarding

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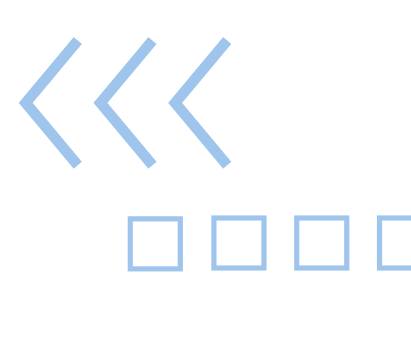
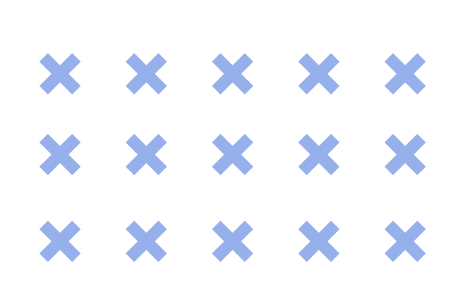
Scaffolding

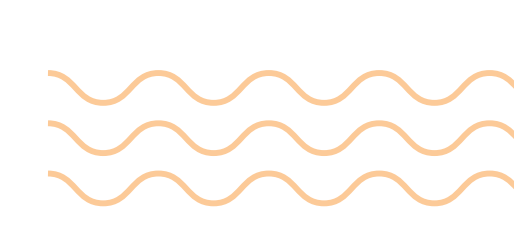
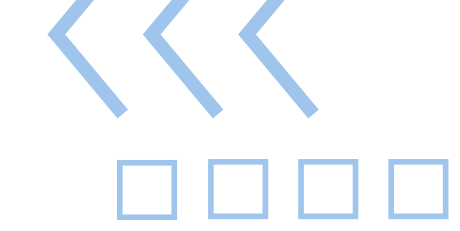
The goal is to give them reasons to KEEP coming back for months or years. New challenges as they grow, progression they can feel, depth that reveals itself over time.

PHASE 4

Endgame

These are your most engaged customers. The goal is to keep them engaged through a sense of purpose and ownership in the product.





The 4 Phases of Every Customer Journey



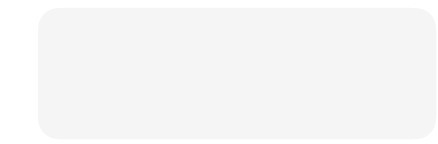
Discovery

- From a Function-Focused Perspective -- there's nothing to optimize here. They're already a customer.
- From a Human-Focused Perspective, this is the most dangerous Phase if left undesigned. Customers who survive your Onboarding typically hit silence.



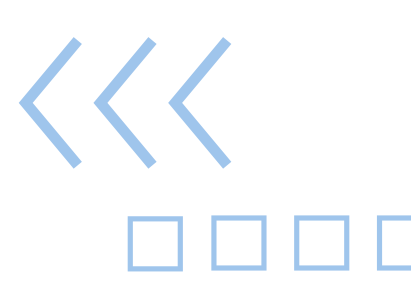
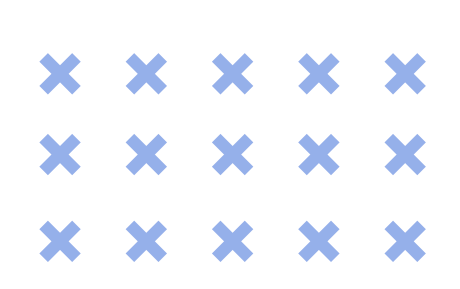
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What customers need in Scaffolding:

- momentum
- visible progress
- recognition
- variable rewards
- habit-building prompts

Weekly Financial Pulse:

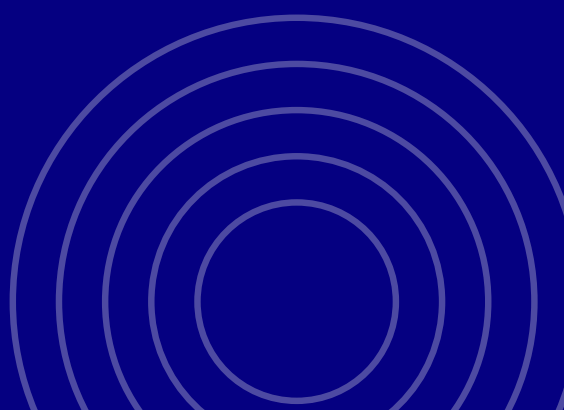
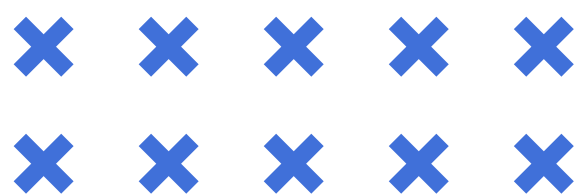
- **Monday:** Spending summary
- **Wednesday:** Biggest savings opportunity
- **Friday:** Week-in-Review with a surprise insight

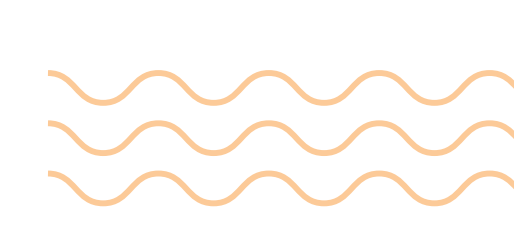
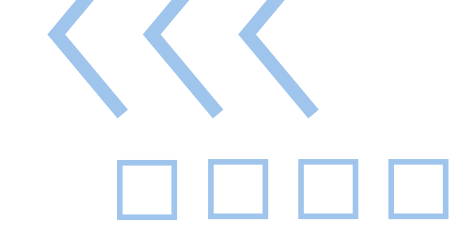
Or it could look like:

Milestone Celebrations: *"You've been with us for 90 days. Here's how your financial health has changed."*

Recognition: *"You're in the top 20% of savers on our platform this month. You've earned an Elite Saver badge."*

Streak: *"You've logged in each week for 8 weeks, you've earned a 'Rich Habits' streak!"*





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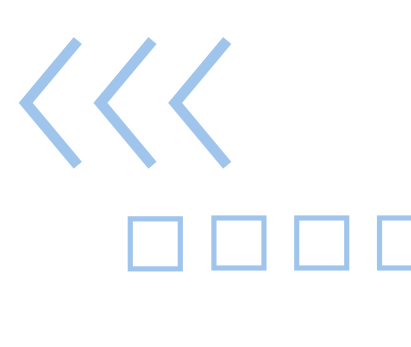
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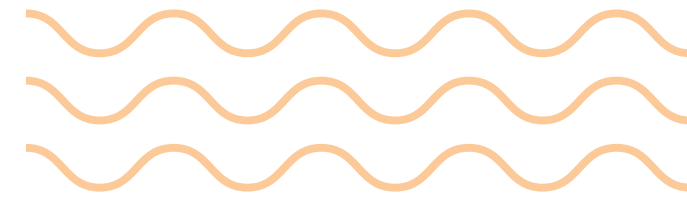
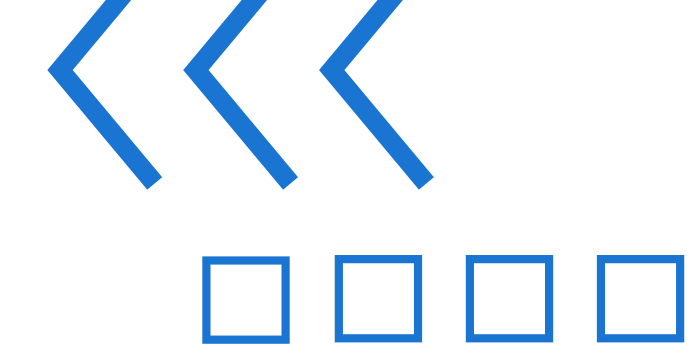


**GIVE ME A
REASON TO
STAY!**



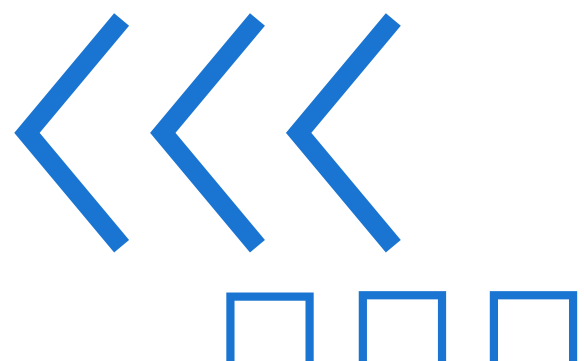
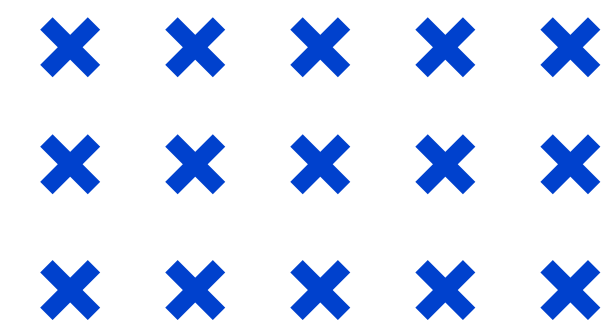
Here's what they **actually** get...

- No celebration moments that make them feel seen
- Advocacy is treated as a marketing ask rather than a client-centric outcome
- No easy referral mechanism
- No loyalty tier that recognizes their years of commitment



The organizations that design Endgame deliberately see disproportionate returns in retention, referral and lifetime value...

This is where people stop being customers and become evangelists!



The structural problem:

- In most organizations, Marketing owns Discovery. Product owns Onboarding. Customer Success owns Scaffolding and Endgame.
- On paper, every Phase has a team.
- But the customer doesn't experience your product in "phases." The customer experiences ONE continuous journey.

**BUT WAIT... I'M IN MARKETING,
I DON'T CONTROL THE PRODUCT!**



A top-down view of a workspace. A silver laptop is open on a wooden desk. The screen shows a blurred email interface with a large white envelope icon on a dark grey background, and a small grey circle with the number '1' in the top right corner. To the left of the laptop is a pair of black-rimmed glasses. To the right is a red pen with a gold band, a grey spiral notebook, and a glass of coffee on a grey saucer. In the top left corner, there is a small white pot with yellow and white orchids. The overall scene is brightly lit and organized.

Marketing's influence
doesn't end at signup

#1: THE NARRATIVE BRIDGE



Warm, aspirational and emotionally compelling messaging

A sterile checklist

ACQUISITION MESSAGING

WHAT YOUR ADS AND LANDING PAGES PROMISED

PRODUCT EXPERIENCE

WHAT THE CUSTOMER ACTUALLY ENCOUNTERS

#1: THE NARRATIVE BRIDGE

Rewrite those first **three to five post-signup emails** so they continue the emotional story your ads started

ACQUISITION MESSAGING

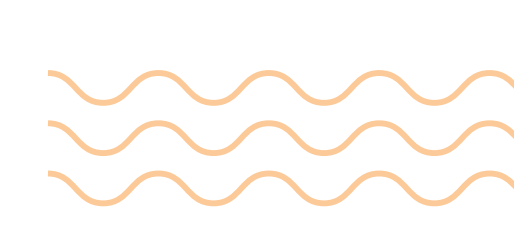
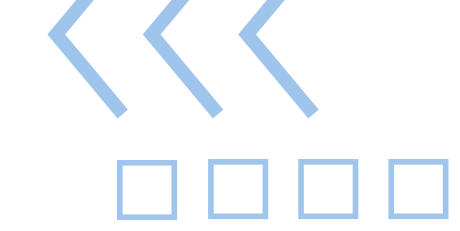
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#2: The Journey Campaign

Day 1

Give one specific action to receive immediate value.
That's Onboarding.

Days 2-7

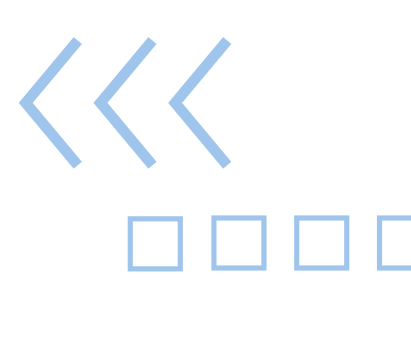
Deepen engagement with personalized insights and establish a rhythm. ***That's the transition to Scaffolding.***

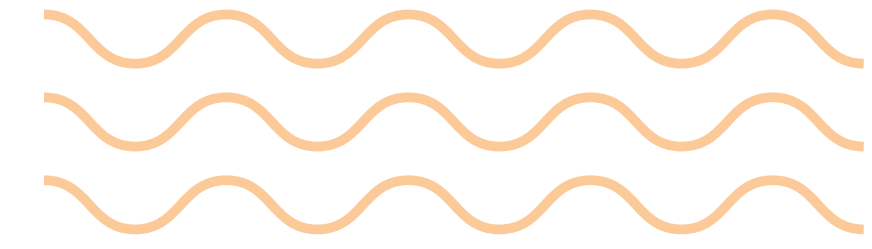
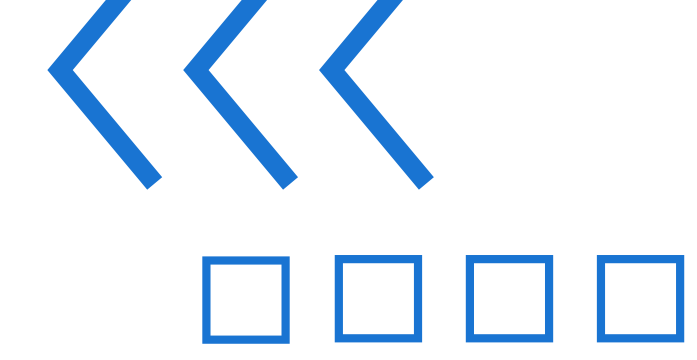
Days 8-30

Celebrate milestones, surface progress and introduce variable rewards. ***That's Scaffolding.***

Days 30+

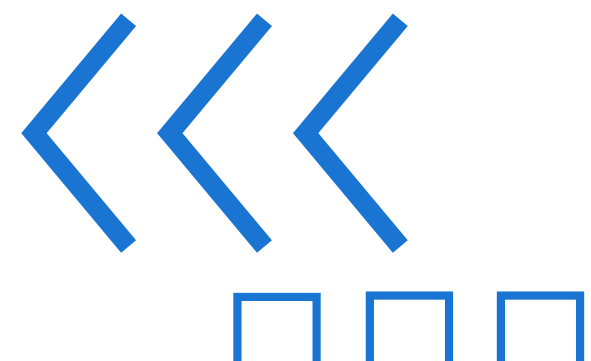
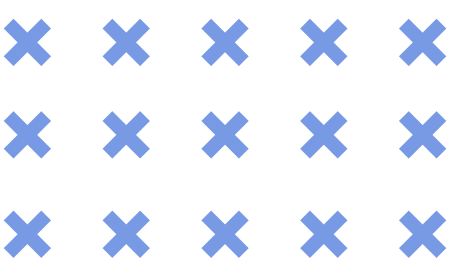
Recognize commitment, introduce referral moments and create insider access. ***That's Endgame.***





#3: Change What You Measure

- **Time to First Win.** How many hours until a new customer experiences value?
- **Activation Rate at Day 7.** Are they coming back?
- **Activation Rate at Day 30.** Did the habit take hold?
- **Revenue Per Activated Customer** vs. Revenue Per Acquired Customer



The Unit Economics...

If you're spending \$50 per acquisition and 91% go inactive within 60 days, your real cost per active customer is **over \$550.**

Move retention from 9% to 20% and **it drops to \$250.**

A **25% improvement** in activation rates correlates with a **34% increase in revenue.** That's the prize on the other side of this work.



So where is **YOUR** gap?



X-FACTOR CX Scorecard

PHASE 1
Discovery
Why would a customer choose this organization?

PHASE 2
Onboarding
How do new customers reach value fast?

PHASE 3
Scaffolding
What keeps customers engaged over time?

PHASE 4
Endgame
How do long-term customers become advocates?

Strategy
The Plan: Who is served, what is promised and how outcomes are achieved

Experiences
The Feel: Behavioral and emotional drivers that sustain engagement

Touchpoints
The Assets: What customers actually see, click and interact with

Clear Value Proposition

Defined Target Customer

Defined Success Outcome

Social Proof & Stories

Emotional Connection

Trust Signals

Landing Pages

Demo or Free Resource

Brand Visuals & Copy

Step-by-Step Success Path

Defined "Aha!" Moment

Stall Recovery Plan

Quick Wins & Rewards

Progress Visibility

Personalized Feedback

Welcome Email / SMS

Setup / Activation Flow

First Week Checklist

Milestone Map

Upsell / Cross-Sell Path

Retention Goals

Variable Rewards

Community & Belonging

Recognition & Status

Dashboard or Portal

Ongoing Notifications

Regular Content Cadence

Referral Program

Loyalty / VIP Tier

LTV Optimization Plan

Celebration of Completion

Identity & Ownership

Insider Access

NPS / Review Process

Referral Mechanism

Case Study Pipeline

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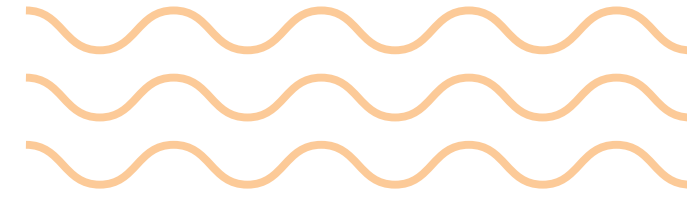
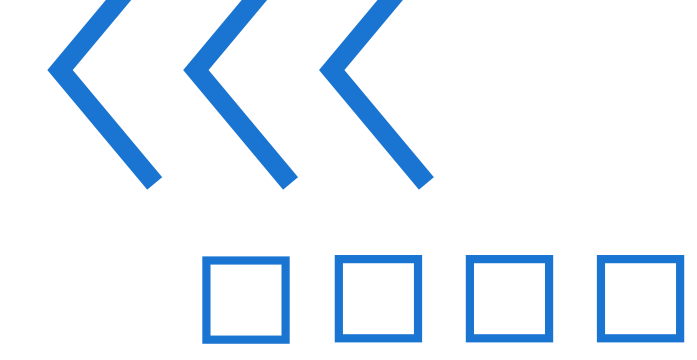
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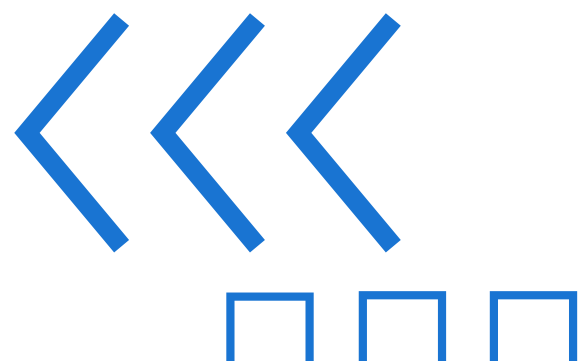
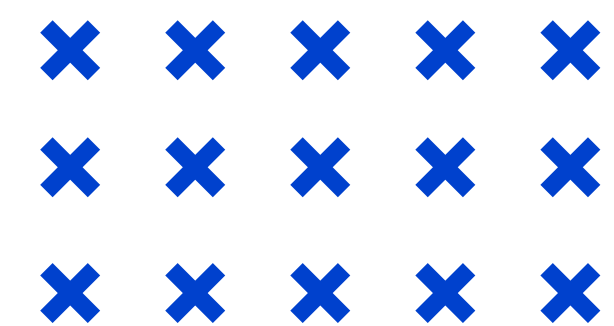
Most organizations score well in Discovery and parts of Onboarding

Scaffolding is where the board starts to turn yellow and red. And Endgame often has big gaps.



Give us 5 minutes and you'll walk away with a score across ALL 4 Phases

and a customized report with the three highest-leverage next steps you can take to close the gap -- specific to your product or service.



The Formula

$$\frac{\text{Monthly Acquisition Spend}}{\text{Customers Still Active at 60 Days}} = \text{Your Real Cost Per Active Customer}$$

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If that number is **5x** or even **10x** your reported Cost Per Acquisition, that's the size of the gap in your organization.

The CX Gaps You Can't See Are the Ones Costing You the Most

Score Your CX in 5 Minutes Across 36 Proven Customer Experience Drivers

COME TO OUR BOOTH

