Lyftz | Supply Chain Management Software
Powering the supply chain of today and tomorrow

THE STORY OF LYFTZ

Lyftz is a fictitious cloud-based supply chain management platform providing order fulfillment, inventory management, order management, and distribution management. Their cloud-based platform integrates all critical functions required for end-to-end order fulfillment, while providing the flexibility to quickly adapt to changing demands or systems. As a result, organizations are empowered to address today's ever-changing supply chain demands with a more modern, flexible approach that enhances operational efficiency, improves accuracy, rapidly adapts to changes, and boosts customer relationships.

BUYER'S JOURNEY MAP

PERSONAS

Buyer Personas are representations of the actual buyers influencing or making decisions about your solutions.

Jeffrey — CEO
Camilla — Warehouse Manager
John — VP of Supply Chain
Henry — Director of IT

JOURNEY STAGES

Buyer's Journey Maps detail the collective path that each buyer persona, and all personas together as a group, take from initial investigation of their pain points and possible solutions through owning a solution. At each stage of the buyer's journey, it's critical to capture the Needs, Activities, Content Preferences, and Participation Level of each persona.

→ **NEEDS:**

What the buyer requires in order to go through their buying process at each stage.

→ **ACTIVITIES:**

What the buyer is actually doing at this stage to fulfill their needs.

→ **CONTENT PREFERENCES:**

What type of content the buyer desires to have at this stage.

Journey stages: DISCOVERING, LEARNING, CHOOSING, PURCHASING, IMPLEMENTING, PROVING, OWNING

PARTICIPATION LEVEL:

What is the buyer persona's level of participation at this stage?

A **Driver** directs the process at this stage.

A **Participant** takes part in activities, but does not direct the process at this stage.

A **Gate Keeper's** approval is needed to pass this stage.

One **Not Involved** is not a participant at this stage.

BUYER STAGE:
DISCOVERING

DISCOVERING
LEARNING
CHOOSING
PURCHASING
IMPLEMENTING
PROVING
OWNING

In Discovering, the buyer has reached a tipping point, realizing they have a pain point they need to learn more about. The buyer conducts educational research to better understand the pain point they're experiencing. This research includes defining the problem, understanding potential causes, seeing how others have tackled the problem, and exploring best practices to address the issue. Based on this research, the buyer clearly defines the problem and decides that it's worth moving forward to address it.

TYPICAL BUYER NEEDS AT THIS STAGE:

- Problem Definition
- Business Justification
- Peer Examples

EXAMPLE: LYFTZ

Buyer: "I need to learn more about this pain point from analysts, trade magazines, and influential bloggers."

Participation Level

Jeffrey — CEO — Not Involved	Camilla — Warehouse Manager — Driver	John — VP of Supply Chain — Partcipant	Henry — Director of IT — Not Involved

Needs

- I need agreement that a cloud-based supply chain management solution is worth employing.
- I need to develop a use case brief that includes how we will leverage a supply chain management solution across warehouse and supply chain functions.
- I need to see how other companies like ours have addressed new supply chain demands brought on by direct-to-consumer online shopping orders.

Activities

- Look for educational content by: web searching for key concepts (top 3 are order fulfillment, warehouse management, and supply chain management); reading posts in relevant LinkedIn groups (Supply Chain and Logistics, Supply Chain Executives, Warehouse Management); searching keywords and conversations in Twitter; reading industry trade publications (Supply Chain Executive, Logistics IT, and Supply and Demand); reading vendor websites whose content appear in search results, in trade publications, and in Twitter or LinkedIn.

- Read analyst reports and press articles on warehouse and supply chain management. Top analyst firms used are Gartner and Forrester. Top publications are Supply Chain Executive, Logistics IT, and Supply and Demand.

- Contact various internal departments, including services, customer support, IT, and warehouse management, to discuss the need to address our pain point—efficiently and accurately fulfilling orders in light of new supply chain demands brought on by online commerce—and develop the business case for why we need a new approach.

- Talk to peers at other companies about this pain point.

- Attend tradeshows and conferences, including Modex, Promat, and NRF.

Content Preferences

- Educational whitepapers
- Educational ebooks
- Influencer blogs and articles
- Educational webinars, especially those that feature customer success stories
- Educational infographics
- Educational blogs from vendors

DISCOVERING
LEARNING
CHOOSING
PURCHASING
IMPLEMENTING
PROVING
OWNING

In Learning, the buyer researches possible solutions to solving their defined problem and begin to identify specific providers. They take into account the various choices available to their business needs and create a broad list of solution options.

TYPICAL BUYER NEEDS AT THIS STAGE:

- Business and Financial Justification
- Solution Requirements/Solution Benefits
- Solution Unique Value Proposition/ Solution Comparisons
- Vendor Viability
- Relevant Vendor Experience

EXAMPLE: LYFTZ

Buyer: "I want to learn more about the various solutions available that can help me address my problem."

Participation Level

Jeffrey — CEO	Camilla — Warehouse Manager	John — VP of Supply Chain	Henry — Director of IT
Participant	Driver	Driver	Gate-Keeper

Needs

- I need to write an ROI case for the CFO. This includes how the increase in the efficiency and accuracy of managing and fulfilling orders with a new solution enhances customer relationships for better brand loyalty, and cuts internal costs associated with inaccuracies, labor management, and IT downtime.
- I need to be sure the solution has the capabilities necessary to solving my problem, which is improving the efficiency and accuracy of fulfilling direct-to-store and direct-to-consumer orders, and quickly adapting to changing warehouse demands and systems.
- I need to understand the cost of the solution.
- I need to understand the value proposition of each solution.
- I need to know that the solutions I'm considering are safe options to present to my team.
- I need to know that vendors have helped customers like me.

Activities

- Assign a project lead.
- Download analyst reports to gain understanding of the different supply chain management/order fulfillment solution options.
- Request and view demos to gain a better understanding of ease of use, alignment to my issues, and capabilities highlighted in the data sheets.
- Research vendors, contact vendors to learn more about capabilities and benefits, and score vendors based on their expertise, alignment to my issue, and cost.
- Develop solution requirements/buying criteria and draft RFP.
- Review RFPs from vendors.
- Begin discussing budget internally.

Content Preferences

- ROI calculators
- Data sheets
- Product whitepapers
- Feature comparisons
- Video demos
- Customer testimonials
- Use case briefs and examples
- Product webinars
- Executive Summary

BUYER STAGE:
CHOOSING

- DISCOVERING
- LEARNING
- **CHOOSING**
- PURCHASING
- IMPLEMENTING
- PROVING
- OWNING

In Choosing, the buyer needs to prove to internal stakeholders that a solution is worth employing to address their problem. Once this is approved, the buyer compares and contrasts solutions, cuts their broad list of solution options into a short list, and then makes a final decision.

TYPICAL BUYER NEEDS AT THIS STAGE:

- Finance and IT Buy-In
- Pricing Options and TCO
- Vendor Viability
- Solution Fit
- Vendor Solution Proof Points (case studies, references, pilots)
- Cross-Functional Alignment

EXAMPLE: LYFTZ

Buyer: "I will drill down into specific proposals to determine which one best fits our needs."

Participation Level

Jeffrey — CEO — Gate-Keeper
Camilla — Warehouse Manager — Driver
John — VP of Supply Chain — Driver
Henry — Director of IT — Gate-Keeper

Needs

- I need to see the software in action for my business and my users.
- I need final solution signoff from the CFO.
- I need final approval from IT that the solution will work within our infrastructure.
- I need a TCO calculation.
- I need collateral (help) from the vendor to satisfy queries/questions from internal stakeholders, notably IT.
- I need to see use cases / success stories of other customers that I consider relevant to my problem.
- I need internal agreement on a preferred solution - this includes the Warehouse Manager, the CEO, the IT Director, and the Supply Chain.
- I need internal alignment on the spending budget.
- I need validation of vendor claims, benefits, capabilities, and customer successes.

Activities

- Speak with analysts for insights into solution capabilities, benefits, and risks, and for vendor validation.
- Compare functionality at an in-depth level.
- Meet the vendor teams and run trials with the top 3 considered solutions.
- Review case studies and speak with customer references.
- Develop solution short list. Remove options that are not a fit in terms of capabilities, benefits, and cost, do provide significant ROI quickly enough, or do not have experience working with customers like us.
- See additional live demos.
- Facilitate IT deep dive review on capabilities, requirements, and security features.
- Present research findings to an evaluation team.
- Make final selection of solution.

Content Preferences

- Feature/function comparisons
- Data sheets
- Live video demos or tutorials
- TCO calculation
- Customer case studies
- ROI calculators
- Customer reference calls
- Presentations by vendor finalists

DISCOVERING

LEARNING

CHOOSING

PURCHASING

IMPLEMENTING

PROVING

OWNING

In Purchasing, the buyer is actually deploying, owning and maintaining the solution. This requires planning, internal alignment, resourcing, approvals and all the things the buyer need to do internally to complete a purchase.

TYPICAL BUYER NEEDS AT THIS STAGE:

• Onboarding Plans
• Approved Contract
• Vendor Support Capabilities
• Final Executive Approval

EXAMPLE: LYFTZ

Buyer: "I need to make sure I get the best possible deal for my company while setting up for success with this vendor. Depending on the company and type of purchase, I may run more than one vendor through the purchase cycle to be sure I have the best deal and have covered all my bases. I am also concerned about making sure my internal stakeholders have completed their diligence, have had their concerns addressed and are signing off on their areas to ensure the purchase has full support."

Participation Level

Jeffrey — CEO	Camilla — Warehouse Manager	John — VP of Supply Chain	Henry — Director of IT
Gate-Keeper	Driver	Driver	Not Involved

Needs

- I need an onboarding plan with timelines.
- I need to know what the vendor will do if I am unhappy somewhere along the way.
- I need to develop a final order and SOW.
- I need a final contract.
- I need legal review of the contract.
- I need signoff from the CEO.

Activities

- Negotiate the contract terms and final price.
- Secure legal and finance sign-off on the contract terms and pricing.
- Complete final order specifications.
- Identify pilot success criteria.
- Identify pilot use cases.
- Develop pilot timeline.

Content Preferences

- How to get started guides
- Customer support portal
- Onboarding and Template Implementation Plan
- Implementation Best Practices
- Online or in-person technical training
- Plain speak version of contract

DISCOVERING

LEARNING

CHOOSING

PURCHASING

IMPLEMENTING

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OWNING

In Implementing, the buyer is deploying the solution, setting up users, receiving training, etc. This process typically involves educating and incorporating a new wave of people to the solution and the process, potentially from diverse groups across the organization.

TYPICAL BUYER NEEDS AT THIS STAGE:

- Detailed Implementation Timeline
- Implementation Resources
- Internal Communication/Awareness of Project Status
- Vendor Updates on Status
- Internal Alignment on Measuring Project Success
- User Training

EXAMPLE: LYFTZ

Buyer: "I am anxious to make sure the process is going smoothly and my business objectives are being met at the cost and schedule I expected. Depending on the size and importance of the purchase, I may be very nervous about the outcome and want a lot of reassurance from my vendor that my needs will be met."

Participation Level

Not Involved	Driver	Participant	Driver
Jeffrey CEO	Camilla Warehouse Manager	John VP of Supply Chain	Henry Director of IT

Needs

- I need status updates both from my team internally and from the vendor.
- I need to understand the project deliverables at each step.
- I need to ensure we agree on the key metrics to capture.
- I need internal and external resources to complete the implementation.
- I need to communicate to other teams about this project.
- I need to present to the executive team about the solution/project.
- I need the initial users to be trained.

Activities

- Develop implementation timeline.
- Identify resources required for implementation—both internally and from vendor.
- Implement solution.
- Schedule and facilitate meetings with internal teams and vendor to review project progress.
- Receive user training from vendor.

Content Preferences

- Implementation guides
- Customer case studies
- End-user training documents, videos, and webinars
- Best practices guides
- Documentation of the Lyftz implementation
- Customer portal

DISCOVERING

LEARNING

CHOOSING

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IMPLEMENTING

PROVING

OWNING
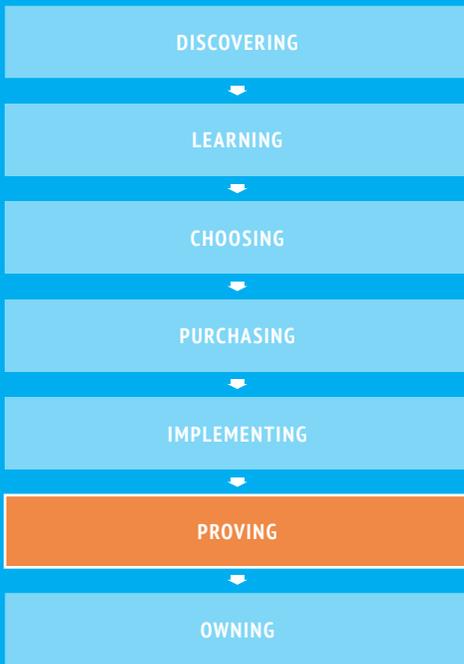
In Proving, the buyer is now using the solution and evaluating its qualities, benefits, and ROI or soon to be ROI.

TYPICAL BUYER NEEDS AT THIS STAGE:

- User Feedback
- Implementation Evaluation and Awareness of Any Loose Ends
- Evaluation and Communication of Project Adoption and Success
- Best Practices for Solution Usage

EXAMPLE: LYFTZ

Buyer: "I am working with the new product or service and attempting to assess success levels. I may have put in a way to measure this in advance and if I didn't, I may be scrambling to understand what is important in my evaluation. I am very interested in how well the service or product is working for my company and I appreciate as many ways of finding out about efficiency and/or problems as possible. Depending on the nature of the product or service, I may be expecting my vendor to be there to help me as I go through this process."

Participation Level

Jeffrey — CEO	Camilla — Warehouse Manager	John — VP of Supply Chain	Henry — Director of IT
Not Involved	Driver	Driver	Not Involved

Needs

- I need to gather feedback from users to ensure they're well informed and happy.
- I need to verify the business challenge has been solved.
- I need to evaluate and report the key metrics.
- I need to check in with other management leaders on adoption and benefits.
- I need to know we are using the solution properly and in the best way for our business in terms of internal efficiency and overall success.
- I need to present the project success to the executive team.

Activities

- Onboard initial users of the solution.
- Establish training program for users.
- Collect and analyze key ROI metrics.
- Adapt internal processes to new solution.
- Research any issues that arose during implementation.

Content Preferences

- ROI calculators
- Best practice (both educational and product specific) tips, guides, blogs, ebooks, and whitepapers
- Customer newsletter

BUYER STAGE:
OWNING

Stage
DISCOVERING
LEARNING
CHOOSING
PURCHASING
IMPLEMENTING
PROVING
OWNING

In Owning, the buyer is using the solution, maintaining it, receiving updates on new capabilities, realizing its ROI, and expanding their usage of the solution.

TYPICAL BUYER NEEDS AT THIS STAGE:

- Awareness of Latest Product Features and Vision
- Plan for Future Use Cases
- Verification of User Satisfaction
- Best Practices for Solution Usage
- Ongoing Review of Success Metrics
- Vendor Partnership

EXAMPLE: LYFTZ

Buyer: "This solution is improving our business performance, and we're using it in so many more ways than we expected. I'm so happy we chose Lyftz!"

Participation Level

Not Involved	Driver	Driver	Participant
Jeffrey CEO	**Camilla** Warehouse Manager	**John** VP of Supply Chain	**Henry** Director of IT

Needs

- I need to stay current on product advancements, releases, and roadmap.
- I need to find additional opportunities to leverage the solution/plan for future growth of solution usage.
- I need to keep current on licenses.
- I need to make sure users are happy.
- I need to make sure we continue to follow best practices.
- I need to continually ensure that we are setting and meeting key goals and ROI metrics.
- I need to know what various types of support I can get from the vendor.
- I need to monitor response time and system performance.

Activities

- Investigate additional use cases for the solution.
- Attend product education webinars, seminars, user groups, customer forums, and events.
- Review and implement product updates.
- Present results to the internal audience.
- Continually review metrics.
- Continually gather user feedback.
- Attend periodic vendor review calls.

Content Preferences

- Release notes
- Solution roadmap reviews
- Best practice (both educational and product specific) tips, guides, blogs, ebooks, and whitepapers
- Customer case studies
- Customer newsletter
- Customer portal