



Banquet Hall Booking

Customer Journey Map - Salesforce CRM Integration

1. Discovery

"I need a venue for my special event"

TOUCHPOINTS

- Google search
- Social media ads
- Word of mouth
- Website landing page

ACTIONS

- Browse venues online
- Check availability
- View photo galleries
- Read reviews

EMOTIONS

- Excited about event
- Overwhelmed by options
- Anxious about planning

😊 Neutral to Positive

PAIN POINTS

- Too many venue options
- Unclear pricing
- Limited availability info

SALESFORCE SOLUTIONS

- Lead capture forms
- Marketing automation
- Website integration
- Real-time availability

2. Research

"Let me compare my options"

TOUCHPOINTS

- Phone inquiries
- Email communication
- Virtual tours
- Social media pages

ACTIONS

- Contact multiple venues
- Compare packages
- Check dates
- Request quotes

EMOTIONS

- Hopeful
- Cautious
- Comparative

😐 Evaluating

PAIN POINTS

- Slow response times
- Incomplete information
- Difficulty comparing

SALESFORCE SOLUTIONS

- Opportunity tracking
- Automated follow-ups
- Quote generation
- Communication logging

3. Consideration

"This venue seems perfect!"

TOUCHPOINTS

- Site visit
- Sales consultation
- Detailed proposals
- Menu tastings

ACTIONS

- Schedule venue tour
- Discuss requirements
- Review contracts
- Negotiate terms

EMOTIONS

- Excited
- Confident
- Ready to commit

😊 Positive

PAIN POINTS

- Complex contracts
- Hidden fees
- Pressure to decide

SALESFORCE SOLUTIONS

- Custom proposals
- Contract management
- Activity tracking
- Approval processes

4. Booking

"Let's make it official!"

TOUCHPOINTS

- Contract signing
- Payment processing
- Booking confirmation
- Welcome package

ACTIONS

- Sign contract
- Pay deposit
- Provide event details
- Set up payments

EMOTIONS

- Relief
- Excitement
- Anticipation

😄 Thrilled

PAIN POINTS

- Paperwork complexity
- Payment processing
- Double booking fears

SALESFORCE SOLUTIONS

- E-signature integration
- Payment tracking
- Booking validation
- Automated confirmations

5. Planning

"Let's plan every detail"

TOUCHPOINTS

- Event coordinator
- Planning meetings
- Vendor coordination
- Final confirmations

ACTIONS

- Menu selection
- Decor planning
- Timeline creation
- Final headcount

EMOTIONS

- Collaborative
- Detailed-oriented
- Slightly stressed

😬 Mixed Emotions

PAIN POINTS

- Too many decisions
- Coordination complexity
- Timeline pressure

SALESFORCE SOLUTIONS

- Event planning tools
- Task management
- Vendor management
- Timeline tracking

6. Event Day

"Today's the big day!"

TOUCHPOINTS

- Event staff
- Day-of coordinator
- Venue management
- Technical support

ACTIONS

- Setup supervision
- Guest reception
- Event coordination
- Issue resolution

EMOTIONS

- Nervous excitement
- Joy
- Gratitude

😍 Ecstatic

PAIN POINTS

- Last-minute changes
- Technical issues
- Guest complications

SALESFORCE SOLUTIONS

- Mobile event app
- Real-time updates
- Issue tracking
- Staff coordination

7. Follow-up

"How was everything?"

TOUCHPOINTS

- Thank you email
- Feedback survey
- Photo sharing
- Future bookings

ACTIONS

- Provide feedback
- Share photos
- Write reviews
- Refer friends

EMOTIONS

- Satisfied
- Nostalgic
- Appreciative

😁 Delighted

PAIN POINTS

- Survey fatigue
- Billing questions
- Missing items

SALESFORCE SOLUTIONS

- Automated surveys
- Customer feedback
- Loyalty programs
- Referral tracking



Key Insights & Salesforce Integration Opportunities



Critical Success Factors

Quick response times, transparent pricing, and seamless communication are crucial for conversion. Salesforce automation can significantly improve response times and lead nurturing.



Opportunity Identification

The research and consideration phases show the highest drop-off rates. Implement targeted nurturing campaigns and automated follow-ups to improve conversion.



Data-Driven Decisions

Use Salesforce analytics to track customer behavior patterns, identify bottlenecks, and optimize the booking process for better customer experience.



Relationship Building

Long-term customer relationships drive referrals and repeat business. Implement loyalty programs and maintain regular communication through Salesforce marketing automation.



Personalization Opportunities

Each event is unique. Use Salesforce to capture preferences and provide personalized recommendations for future events and services.



Process Optimization

Automation of routine tasks (confirmations, reminders, follow-ups) allows staff to focus on high-value activities and personal touch points.