

IDENTIFY WHERE CONFIDENCE DROPS, FRICTION BUILDS, AND REVENUE LEAKS.
WORK THROUGH EACH SECTION HONESTLY. IF IT FEELS UNCOMFORTABLE, YOU'RE DOING IT RIGHT.

TICK ✓ IF STRONG. | CIRCLE × IF BROKEN. | × = REVENUE LEAK.

WHERE TRUST IS WON OR LOST

- ☐ Enquiries are responded to quickly
- ☐ Customers clearly understand next steps
- ☐ Website / landing pages reduce confusion
- ☐ Calls or messages don't go unanswered

Where do customers hesitate or drop off first?

WHERE MOMENTUM IS LOST

- ☐ Thank-you / confirmation feels human
- ☐ Customers aren't left in silence
- ☐ Follow-ups add value (not noise)
- ☐ Automation supports, not replaces, reassurance

Where do customers feel "done with" instead of supported?

WHERE EARLY CHURN HIDES

- ☐ Onboarding steps are clear and visible
- ☐ A quick win is delivered in week one
- ☐ Expectations are set early
- ☐ Proactive check-ins replace firefighting

What happens in the first 7 days after someone buys?

WHERE FRUSTRATION BUILDS

- ☐ Response times are consistent
- ☐ Escalation paths are clear
- ☐ Issues are resolved, not just closed
- ☐ Humans step in when urgency is high

Where does efficiency override empathy?

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WHERE REVENUE COMPOUNDS (OR DOESN'T)

- ☐ Repeat customers are recognised early
- ☐ There's a clear reason to return
- ☐ Loyalty is rewarded quickly
- ☐ Retention is treated as a revenue metric

Why should a customer choose you again?

WHERE BLIND SPOTS FORM

- ☐ Feedback is collected at key moments
- ☐ Themes are reviewed regularly
- ☐ Customers see action taken
- ☐ CX data is visible to leadership

What do customers know that leadership doesn't?

SCORING BLOCK:

20–24 ✓ → MINOR LEAKS (OPTIMISATION PHASE)

14–19 ✓ → REVENUE AT RISK

≤13 ✓ → GROWTH IS LEAKING RIGHT NOW

IF YOUR SCORE IS LOW, THIS ISN'T A MARKETING PROBLEM.

YOUR TOP 3 CX LEAKS

1.

2.

3.

If you only fixed these three, what would change?

FOUND LEAKS? DON'T GUESS WHAT TO FIX FIRST.

This worksheet shows where the leaks are.

The Fix-It Call shows you what to fix first — and why.

[Book A Fix-It Call](#)

15 MINUTES. NO FLUFF. CLEAR PRIORITIES.