YOURCXC

STOP THE SILENT CHURN.
YOUR CX FIX AUDIT.

FIND THE MOMENTS THAT ARE COSTING YOU CUSTOMERS—AND FIX THEM FAST.

WHAT'S INSIDE THE TOOLKIT?

CX Audit Checklist Template	A comprehensive list to assess every touchpoint, from website to support.
Customer Touchpoint Inventory Template	Map out all your customer-facing moments in one place.
Friction Spot Identifier Template	Log and score common pain points based on frequency and impact.
CX Scorecard Template	Grade your customer experience by function, channel, and consistency.
Feedback Loop Checklist Template	Build a process to collect, respond to, and act on customer feedback.

WHO IS THIS FOR?

- Small and medium business owners
- Customer service managers
- Marketing teams
- CX consultants and freelancers
- Digital agencies auditing client journeys

WHAT YOU'LL BE ABLE TO DO

- Conduct a full CX audit in less than 2 hours
- Reveal experience gaps costing you conversions or loyalty
- Prioritise what to fix first using impact-weighted scoring
- Make internal alignment easier with a shared audit view
- Use templates to deliver client-ready CX reviews

CX AUDIT CHECKLIST TEMPLATE

Use this detailed checklist to assess the quality and consistency of your customer experience across key stages.

1. WEBSITE & FIRST IMPRESSIONS

- [ ] Website loads quickly on desktop and mobile
- [ ] Navigation is clear and intuitive
- [ ] Contact information is easy to find
- [ ] Value proposition is clearly stated on the homepage
- [ ] Live chat or help is accessible (if offered)
- [ ] Tone and visuals align with brand identity

2. INQUIRY & LEAD CAPTURE

- [ ] Contact forms are easy to complete and submit
- [ ] Confirmation message is shown after form submission
- [ ] Follow-up emails are timely and personalised
- [ ] Leads are tracked and routed to the right team
- [ ] Lead magnets/downloads are easy to access

3. PURCHASE OR BOOKING PROCESS

- [ ] Steps are simple and streamlined
- [ ] Clear pricing, packages, or booking options are provided
- [ ] Payment methods work smoothly (if applicable)
- [ ] Confirmation page/email is clear and reassuring
- [ ] Instructions for next steps are provided immediately

4. ONBOARDING & FIRST USE

- [ ] Customers know what to expect post-purchase/signup
- [ ] Welcome email or kit is sent within 24 hours
- [ ] Product or service access/setup is easy to follow
- [ ] FAQs or help guides are available and helpful
- [ ] First use is friction-free & aligned with customer goals

5. COMMUNICATION & SUPPORT

- [ ] Support contact methods are clear and available
- [ ] Response times meet or exceed expectations
- [ ] Tone of communication is professional and friendly
- [ ] Support issues are documented & resolved quickly
- [ ] Follow-ups or satisfaction checks are built in

6. ONGOING ENGAGEMENT

- [ ] Regular updates, offers, or newsletters are sent
- [ ] Customer is encouraged to provide feedback
- [ ] Community or education resources are offered
- [ ] Milestones (anniversaries, usage goals) are celebrated

7. FEEDBACK & REVIEWS

- [ ] Customer feedback is collected regularly
- [ ] NPS/CSAT/CES data is tracked and analysed
- [ ] Negative feedback is followed up and closed looped
- [ ] Reviews are monitored and responded to
- [ ] Improvements based on feedback are communicated back

8. RETENTION & LOYALTY

- [ ] Loyalty programs or exclusive offers are in place
- [ ] Churn risks are identified and proactively managed
- [ ] Reactivation campaigns are run for lapsed customers
- [ ] Customers are asked for referrals or testimonials
- [ ] VIPs or high-value clients are recognised

CUSTOMER TOUCHPOINT INVENTORY TEMPLATE

TOUCHPOINT	JOURNEY STAGE	CHANNEL	CUSTOMER INTENT	OWNER	LAST UPDATED	IMPROVEMENT NEEDED (Y/N)

CUSTOMER FRICTION SPOT INDENTIFIER TEMPLATE

JOURNEY STAGE	TOUCHPOINT	OBSERVED FRICTION	CUSTOMER IMPACT	SOURCE (E.G DATA, FEEDBACK)	QUICK FIX? (Y/N)	OWNER

CUSTOMER EXPERIENCE SCORECARD TEMPLATE

CX DIMENSION	METRIC OR CRITERIA	SCORE (1–5)	COMMENTS/OBSERVATIONS	OWNER	LAST REVIEWED
Website Experience	Ease of navigation				
Website Experience	Mobile responsiveness				
Communication	Clarity of messaging				
Communication	Response time (support/sales)				
Purchase Process	Ease of transaction/booking				
Purchase Process	Clarity of pricing				
Onboarding	Speed of setup/delivery				
Onboarding	Customer understanding of next steps				
Support	Availability of support channels				
Support	Effectiveness of problem resolution				
Feedback & Insights	Ease of giving feedback				
Feedback & Insights	Evidence of acting on feedback				
Retention & Loyalty	Customer satisfaction (CSAT)				
Retention & Loyalty	Net Promoter Score (NPS)				

1. CAPTURE FEEDBACK

☐ Use CSAT, NPS, CES surveys at key stages (e.g., purchase, support, onboarding)

☐ Collect input via reviews, interviews, tickets, and chat logs

☐ Ensure feedback forms are easy to find and use

2. ORGANISE FEEDBACK

☐ Tag feedback by theme, journey stage, or sentiment

☐ Centralise feedback in one dashboard or CRM

☐ Assign visibility/access to the right team members

3. ANALYSE FEEDBACK

☐ Identify top themes, trends, and root causes

☐ Segment by customer type or lifecycle stage

☐ Highlight urgent issues and recurring friction points

4. ACT ON INSIGHTS

☐ Prioritise improvements (quick wins vs. systemic fixes)

☐ Assign owners to key action items

☐ Update teams on progress and next steps

5. CLOSE THE LOOP

☐ Thank customers who shared feedback

☐ Share 'you said, we did' outcomes publicly or directly

☐ Measure satisfaction again post-change

6. MAINTAIN THE LOOP

☐ Review feedback weekly or monthly

☐ Discuss trends in cross-functional meetings

☐ Document actions and learnings

☐ Continuously refine your process

YOURCXC

FIX THE EXPERIENCE.
GROW THE REVENUE.

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