

YOURGXC | MAP IT. FIX IT. OPTIMISE IT.

A TOOLKIT TO FIX EVERY BROKEN STEP AND TOP THE BLEEDING.

WHAT'S INSIDE THE TOOLKIT?

Customer Journey Mapping Template

Visual template to map out customer touchpoints from discovery to loyalty.

CX Audit Checklist

A ready-to-use checklist to identify friction points across the journey.

Persona Builder Worksheet

Helps define and prioritise customer personas for your business.

Feedback Framework Guide

Templates and scripts for collecting structured customer feedback.

Email & Onboarding Flow Blueprint

Journey-based messaging structure to engage customers after sign-up.

Journey Gap Analysis Sheet

Analyse touchpoint performance vs. customer expectations.

WHO IS THIS FOR?

- Small business owners
- Marketing or CX teams
- Freelancers working with service-based clients
- Anyone who wants to improve retention, satisfaction, and lifetime value

WHAT YOU'LL BE ABLE TO DO

- Map your entire customer journey step by step
- Spot and fix experience gaps
- Create messaging and onboarding that converts
- Build loyalty loops and feedback cycles
- Improve internal team alignment on customer experience

CUSTOMER JOURNEY MAPPING TEMPLATE

STAGE	AWARENESS	CONSIDERATION	PURCHASE	ONBOARDING	RETENTION
TOUCHPOINTS E.G: Website, Email, Call, Social Media, Store Visit					
CUSTOMER GOALS E.G: What is the customer trying to achieve?					
EMOTIONS E.G: How does the customer feel at this stage?					
PAIN POINTS E.G: What are the barriers or frustrations?					
OPPORTUNITIES E.G: How can we improve the experience?					
CHANNEL E.G: Where does the interaction happen?					
OWNER E.G: Who is responsible internally?					

CUSTOMER EXPERIENCE AUDIT CHECKLIST TEMPLATE

WEBSITE EXPERIENCE

☐

Easy Navigation

☐

Clear CTAs

☐

Mobile Friendly

CUSTOMER SUPPORT

☐

Response Time Under 24 Hours

☐

Multiple Support Channels

☐

Empathetic Tone

COMMUNICATION

☐

Consistent Branding

☐

Follow-Up E-Mails

☐

Proactive Outreach

FEEDBACK & SURVEYS

☐

Easy To Submit Feedback

☐

Quick Survey Links

☐

Incentives To Respond

ONBOARDING & RETENTION

☐

Welcome E-Mail Sequence

☐

Helpful Tutorials

☐

Loyalty Programs

CUSTOMER PERSONAS TEMPLATE

PERSONAS	PERSONA 1	PERSONA 2	PERSONA 3	PERSONA 4	PERSONA 5
NAME E.G: Steve Smith					
AGE E.G: 35					
JOB TITLE E.G: Founder of SaaS Company					
GOALS E.G: What are their professional goals?					
CHALLENGES E.G: What obstacles do they face?					
PREFERRED CHANNELS E.G: E-Mail, Social Media, Webinars					
QUOTE E.G: A typical quote or insight for their persona					
TOOLS USED E.G: CRM, E-Mail Marketing Tools, Analytics Platforms					

FEEDBACK FRAMEWORK GUIDE

This guide is designed to help you establish a structured, actionable customer feedback process that aligns with your customer journey.

1. DEFINE FEEDBACK OBJECTIVES

- Overall satisfaction (CSAT)
- Likelihood to recommend (NPS)
- Ease of experience (CES)
- Insights on onboarding, support, or purchase process
- Product or service improvements

2. CHOOSE THE RIGHT FEEDBACK CHANNELS

- Email surveys (post-interaction or periodic)
- Embedded website widgets (e.g., thumbs p/down, short polls)
- Live chat or support follow-ups
- In-app or platform feedback prompts
- Phone or video interviews
- Review sites and social listening

3. MAP FEEDBACK COLLECTION TO THE JOURNEY

- First website visit → Was the site clear and easy to navigate?
- Post-purchase → Was the buying experience smooth?
- After onboarding → How was the setup or training process?
- After support interaction → Was the issue resolved effectively?
- 30/60/90 days after joining → Are expectations being met?

4. ASK THE RIGHT QUESTIONS

- How satisfied are you with [interaction/product/service]? (CSAT)
- How easy was it to [complete the action]? (CES)
- How likely are you to recommend us? (NPS)
- What's one thing we could do to improve your experience?
- Did anything surprise or delight you about our service?

5. ORGANISE AND ANALYSE FEEDBACK

- Tag feedback by journey stage or channel
- Group responses by theme or issue type
- Identify frequency and severity of issues
- Use sentiment analysis for qualitative responses (optional)
- Highlight feedback linked to churn or conversion changes

6. RESPOND AND CLOSE THE LOOP

- Acknowledge feedback promptly
- Let customers know their feedback is being reviewed
- Share what actions are being taken based on insights
- Follow up with customers where appropriate
- Share trends and actions internally with the team

7. BUILD A CONTINUOUS FEEDBACK CULTURE

- Make feedback a standing agenda item in team meetings
- Celebrate improvements driven by customer insights
- Train staff to request and welcome feedback naturally
- Use dashboards to track and share progress
- Involve all departments in closing the loop

E-MAIL & ONBOARDING FLOW BLUEPRINT

1. DEFINE YOUR ONBOARDING GOALS

- Deliver a welcoming and professional first impression
- Educate customers on how to get value from your product/service
- Drive key activation actions (e.g., login, first use, booking)
- Reduce early churn and confusion
- Encourage feedback and connection with your team

2. MAP YOUR ONBOARDING JOURNEY

- Day 0: Signup/Transaction Confirmation → Welcome message, expectations
- Day 1: Get Started Email → Login/setup guidance or key first action
- Day 3–5: Success Tips Email → Feature highlights, quick wins
- Day 7: Check-in Email → Support offer, FAQs, request feedback
- Day 14: Community/Case Study Email → Build trust, reinforce value
- Day 21–30: Upgrade/Referral CTA → Extend engagement or monetisation

3. EMAIL FLOW BLUEPRINT

Email 1 – Welcome & Expectations

Subject: Welcome to [Brand]! Let's Get Started

Introduce the brand, confirm what they signed up for, and set expectations.

Include a CTA: Log in / Get Started

Email 2 – Setup Instructions or First Action

Subject: Take Your First Step with [Product/Service]

Guide them through their first action. Include a how-to video, checklist, or key resource.

CTA: Activate / Schedule / Setup

Email 3 – Success Tips & Feature Highlights

Subject: 3 Ways to Get More Value from [Brand]

Show 2–3 common use cases or product benefits. Help users unlock quick wins.

CTA: Try Feature / Explore Tool

Email 4 – Check-in & Feedback

Subject: Need Help? We're Here for You

Offer support, answer FAQs, and ask for early feedback.

CTA: Contact Support / Fill Quick Survey

Email 5 – Social Proof / Case Study

Subject: See How [Customer Name] Achieved [Result]

Share a client story or result. Reinforce trust and alignment with their goals.

CTA: Learn More / Reply to This Email

Email 6 – Upgrade, Referral or CTA

Subject: Unlock Even More with [Upgrade/Referral Offer]

Invite them to upgrade, refer others, or attend a session.

CTA: Upgrade / Refer / Book Call

4. BEST PRACTICES FOR ONBOARDING FLOWS

Keep each email focused on one topic or action

Use clear CTAs and benefit-driven subject lines

Include visuals like screenshots or videos where possible

Personalise with name, usage data, or goals

Test send times and improve based on open/click rates

Make it easy to contact support or ask questions

JOURNEY GAP ANALYSIS TEMPLATE

STAGE	TOUCHPOINTS	CUSTOMER EXPECTATION	ACTUAL EXPERIENCE	IDENTIFIED GAP	PRIORITY (H/M/L)
AWARENESS					
↓					
CONSIDERATION					
↓					
PURCHASE					
↓					
ONBOARDING					
↓					
RETENTION					

YOURCXC

**FIX THE EXPERIENCE.
GROW THE REVENUE.**

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