

YOUR CX | DASHBOARDS DON'T IMPRESS. RESULTS DO.

THIS TOOLKIT HELPS YOU BUILD A CX TRACKING SYSTEM THAT EARNS BUY-IN—AND BUDGET.

WHAT'S INSIDE THE TOOLKIT?

CX Metrics Dashboard Template

Visualise key metrics like CSAT, NPS, CES, Retention, and Response Time in one place.

Metrics Definitions & Benchmark Guide

Understand what each metric means, how to calculate it, and what good looks like.

Customer Feedback Tracker Template

Log survey responses and quickly identify patterns.

Weekly CX Team Report Template

Share key learnings, wins, and focus areas across departments.

CX KPI Planning Sheet Template

Set goals, assign owners, and track progress over time.

WHO IS THIS FOR?

- Customer experience & support teams
- Marketing leads & operations managers
- CX consultants and coaches
- Service-based businesses with growing customer bases

WHAT YOU'LL BE ABLE TO DO

- Track all CX data in one place
- Spot trends in customer feedback
- Align KPIs with business goals
- Share performance transparently
- Make informed decisions to improve CX

CX METRICS DASHBOARD TEMPLATE

METRIC	CURRENT	TARGET	LAST MONTH	CHANGE %	OWNER	NOTES
CSAT (Customer Satisfaction Score)						
NPS (Net Promoter Score)						
CES (Customer Effort Score)						
Retention Rate						
Churn Rate						
First Response Time						
Resolution Time						

METRICS DEFINITIONS & BENCHMARK GUIDE

Use this guide to understand the key customer experience (CX) metrics, how to calculate them, and what benchmarks to aim for.

CUSTOMER SATISFACTION SCORE (CSAT)

Definition: Measures how satisfied a customer is with a specific interaction, product, or service.

Formula: $CSAT = (\text{Number of satisfied responses} / \text{Total responses}) \times 100$

Benchmark: Good: 75%–85% | Excellent: 85%+

NET PROMOTER SCORE (NPS)

Definition: Measures likelihood of customer recommending your brand to others.

Formula: $NPS = \% \text{ Promoters (9-10)} - \% \text{ Detractors (0-6)}$

Benchmark: Typical B2C: 30–50 | B2B: 10–30 | World-class: 60+

CUSTOMER EFFORT SCORE (CES)

Definition: Measures how easy it was for a customer to complete a task (e.g., resolve an issue, make a purchase).

Formula: CES = Average score on a 5- or 7-point scale (lower = harder effort, higher = easier effort)

Benchmark: Average: 4.3+ (on a 5-point scale) | 6+ (on a 7-point scale)

CUSTOMER RETENTION RATE

Definition: Percentage of customers who remain with you over a given period.

Formula: $\text{Retention Rate} = ((\text{End customers} - \text{New customers}) / \text{Start customers}) \times 100$

Benchmark: Good: 75%–90% depending on industry | SaaS average: 85%+

CUSTOMER CHURN RATE

Definition: Percentage of customers lost during a specific period.

Formula: $\text{Churn Rate} = (\text{Customers lost} / \text{Start customers}) \times 100$

Benchmark: SaaS avg: 5%–7% monthly churn | eCommerce: 20–30% annual churn

FIRST RESPONSE TIME (FRT)

Definition: Time taken to respond to a customer query (first contact).

Formula: FRT = Average time from query received to first reply

Benchmark: Email: < 12 hrs | Live Chat: < 2 min | Phone: < 3 rings

RESOLUTION TIME

Definition: Time taken to fully resolve a customer issue.

Formula: Resolution Time = Average time from ticket creation to closure

Benchmark: Average: < 24 hours | World-class: < 6 hours (complex B2B: < 48 hours)

WEEKLY CX TEAM REPORT TEMPLATE

WEEK OF:

05/05/2025

TOP CX HIGHLIGHTS THIS WEEK:

Wins, great feedback, milestones, etc.

TOP ISSUES OR FRICTION POINTS REPORTED:

What complaints or pain points surfaced most often?

METRIC SNAPSHOT:

CSAT:
[Value]

NPS:
[Value]

CES:
[Value]

First Response Time:
[Value]

Resolution Time:
[Value]

VOICE OF CUSTOMER THEMES:

Positive: [E.g. friendly service, fast delivery]

Negative: [E.g. onboarding confusion, billing errors]

FEEDBACK VOLUMES:

SURVEYS:
[Volume]

REVIEWS:
[Volume]

SUPPORT:
[Volume]

CHAT:
[Volume]

SOCIAL:
[Volume]

ACTIONS TAKEN OR IN PROGRESS:

What improvements or experiments were launched this week?

TEAM COMMENTS & COLLABORATION NOTES:

Cross-functional handoffs, feedback loops, open needs

PRIORITY CX FOCUS FOR NEXT WEEK:

Key goals, experiments, or issues to solve

CX KPI PLANNING SHEET TEMPLATE

OBJECTIVE	KPI	BASELINE	GOAL	TIMELINE	OWNER	STATUS
Improve CSAT						
Increase NPS						
Reduce Churn						
Faster Resolution Time						
Improve CES						

YOURCXC |

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

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