

YOURCX |

**CX STRATEGY THAT DOESN'T SUCK.
BUILD IT. FIX IT. SCALE IT.**

FINALLY—A CX STRATEGY THAT DRIVES REVENUE, NOT JUST MEETINGS.

WHAT'S INSIDE THE TOOLKIT?

CX Strategy Canvas Template

A one-page strategy builder covering goals, segments, journeys, feedback loops, and metrics.

Customer Experience Vision Worksheet Template

Clarify and document your brand's CX promise and guiding principles.

CX Objectives & KPI Planner Template

Align team goals with measurable CX outcomes.

Customer Journey Maturity Model Template

Assess where you are today and where to grow next.

Voice of Customer (VoC) Strategy Template

Map how and when you'll listen to your customers, and what to do with insights.

WHO IS THIS FOR?

- Business leaders ready to systemise customer experience
- Marketing and service teams building better client journeys
- CX consultants and strategists
- Digital agency partners working with service brands

WHAT YOU'LL BE ABLE TO DO

- Define your CX strategy on one page
- Set clear goals and metrics for success
- Align your team around a shared CX vision
- Identify where your journey gaps lie
- Establish a feedback and improvement loop

CX STRATEGY CANVAS TEMPLATE

1. CX VISION STATEMENT

Describe the overall experience you want every customer to have. Keep it short, aspirational, and actionable:

2. TARGET CUSTOMER PERSONAS

List your primary customer types. Include needs, pain points, and what they value in an experience:

3. BRAND PROMISE & VOICE

Define how your brand shows up to customers — tone, expectations, and consistency:

4. KEY MOMENTS OF TRUTH

Highlight 3–5 moments that make or break customer satisfaction. These often include: purchase, onboarding, service, renewal:

5. CX GOALS & KPIS

Outline top objectives (e.g., increase CSAT, reduce churn) and how you'll measure success (e.g., NPS, retention, CES):

6. CX PILLARS & PRINCIPLES

Define the values that guide experience delivery — e.g., empathy, speed, transparency:

7. FEEDBACK & INSIGHT LOOP

Explain how you gather, analyse, and act on customer feedback continuously:

8. FRICTION FIXES IN PROGRESS

Document current or upcoming initiatives to remove pain points in the journey:

9. TEAM ROLES & OWNERSHIP

Clarify who owns which parts of the experience (e.g., onboarding, support, product):

10. NEXT 90-DAY PRIORITIES

List 3–5 experience initiatives your team will focus on in the next 3 months:

CUSTOMER EXPERIENCE VISION WORKSHEET TEMPLATE

1. WHAT DOES AN IDEAL EXPERIENCE LOOK LIKE FOR YOUR CUSTOMER?

Describe what the customer should feel, see, and remember after interacting with your brand.

Example: 'Effortless, supportive, and surprisingly personal.'

2. WHAT EMOTIONS SHOULD YOUR BRAND INSPIRE AT KEY MOMENTS?

List the emotions you want customers to feel at: First touch, Purchase, Service, Retention.

Example: Trust, confidence, satisfaction, excitement.

3. WHAT ARE YOUR BRAND'S CX NON-NEGOTIABLES?

Identify experience principles or promises that must always be delivered.

Example: Always respond within 2 hours, explain every next step, greet every customer by name.

4. WHAT MAKES YOUR CX DIFFERENT FROM COMPETITORS?

Describe your competitive edge in service, delivery, or care.

Example: You offer a personal onboarding call for every new customer.

5. WHAT BARRIERS COULD BLOCK THE CX VISION?

List internal or external issues that could make it hard to live up to the vision.

Example: Disconnected systems, unclear team roles, limited resources.

6. WHAT DOES CX SUCCESS LOOK LIKE?

Define what outcomes show that the CX vision is working.

Example: Customers refer others, leave positive reviews, renew, or expand accounts.

7. DRAFT YOUR CX VISION STATEMENT

Bring it all together in one simple sentence.

Format: '[Brand] delivers a customer experience that is [adjective, adjective], making every [touchpoint] [result].'

CX OBJECTIVES & KPI PLANNER TEMPLATE

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

CUSTOMER JOURNEY MATURITY MODEL TEMPLATE

LEVEL 1 – AD HOC

- No formal journey maps or defined processes.
- Customer experience varies by team or channel.
- Little to no use of feedback data for journey planning.

LEVEL 2 – DEFINED

- Basic journey maps exist for major touchpoints.
- Customer experience standards are outlined, but not consistent.
- Feedback is collected but not systematically used.

LEVEL 3 – MANAGED

- End-to-end journey maps are documented and shared.
- CX goals are aligned to customer journey stages.
- Feedback is analysed and used to prioritise improvements.

LEVEL 4 – OPTIMISED

- Customer journeys are continuously monitored and refined.
- CX metrics are tied to specific journey stages.
- Cross-functional teams collaborate to improve journeys.

LEVEL 5 – INTEGRATED & PREDICTIVE

- Real-time data informs journey personalisation and automation.
- AI and predictive analytics shape next-best actions.
- Journey orchestration is embedded in day-to-day operations.

YOUR MATURITY ASSESSMENT

Current Level:

Reasoning / Evidence:

Next Target Level:

Action Steps to Advance Maturity:

VOICE OF CUSTOMER (VOC) STRATEGY TEMPLATE

1. VOC GOALS

- What are the main objectives of your VoC program?
- Examples: Improve customer satisfaction, identify root causes of churn, increase referral rates.

2. FEEDBACK SOURCES

- List where you'll collect feedback (surveys, reviews, support tickets, interviews, etc.).
- Segment by channel and journey stage: post-purchase, onboarding, support, etc.

3. KEY METRICS

- Identify the metrics you'll track (e.g., CSAT, NPS, CES, Sentiment Score).
- Define what success looks like for each metric.

4. COLLECTION FREQUENCY & TRIGGERS

- How often will feedback be collected?
- Trigger examples: after purchase, after support call, 30 days after onboarding.

5. FEEDBACK MANAGEMENT PROCESS

- How will feedback be organised, analysed, and shared?
- Who is responsible for tagging, reporting, and escalating key issues?

6. CLOSING THE LOOP

- Describe your plan for following up with customers who give feedback.
- Include internal updates, customer-facing communications, and action planning.

7. TEAM ROLES & RESPONSIBILITIES

- List who owns what within the VoC process (e.g., data analysis, team updates, responding to reviews).
- Assign accountability across departments (e.g., Marketing, CX, Support).

8. TOOLS & TECHNOLOGY

- What tools will you use to collect, manage, and analyse feedback?
- Examples: Google Forms, Typeform, Hotjar, HubSpot, Airtable, Notion, Power BI.

9. COMMUNICATION & REPORTING

- How will feedback insights be shared across the organisation?
- Weekly emails, dashboards, CX reviews, internal forums.

10. CONTINUOUS IMPROVEMENT PLAN

- How will you track improvements over time?
- What cadence will you use to review and refine your VoC strategy? (e.g., quarterly VoC audit)

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

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