

YOUR CX

**FIX YOUR CX FAST.
THE NO-FLUFF STARTER TOOLKIT.**

A BRUTAL CX REALITY CHECK—PLUS THE TOOLS TO DO SOMETHING ABOUT IT.

WHAT'S INSIDE THE TOOLKIT?

Customer Journey Map Template

Map out every key moment — awareness to advocacy — in a visual, editable format.

CX Audit Checklist Template

Assess your current customer experience across touchpoints, channels, and systems.

CX Vision & Values Worksheet Template

Define your brand's CX promise, tone, and internal alignment.

Customer Persona Builder Template

Identify and document your primary customers' needs, pain points, and expectations.

VoC Strategy Snapshot Template

Decide how, where, and when to collect actionable customer feedback.

CX Metrics Mini Dashboard Template

Track CSAT, NPS, Retention, and Customer Effort with built-in formulas and visual scoring.

WHO IS THIS FOR?

- Founders & business owners getting started with CX
- Marketing or service teams setting up CX systems
- Freelancers, consultants & digital agencies offering CX services
- Anyone creating their first customer experience playbook

WHAT YOU'LL BE ABLE TO DO

- Map and understand your customer journey
- Audit and improve weak points in your experience
- Create a shared CX vision with your team
- Start collecting and acting on feedback
- Track progress using meaningful CX metrics

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?					

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

CX VISION & VALUES 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].'

CUSTOMER PERSONA BUILDER 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					

VOC STRATEGY SNAPSHOT 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)

CX METRICS MINI 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						

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

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