

YOUR CX

**YOUR CX ISN'T A JOURNEY.
IT'S EVERY DAMN INTERACTION.**

THIS TOOLKIT SHOWS YOU WHERE IT BREAKS—AND HOW TO FIX IT.

WHAT'S INSIDE THE TOOLKIT?

Customer Touchpoint Mapping Template

Identify, visualise, and prioritise every customer touchpoint across the journey.

Touchpoint Performance Audit Checklist

Evaluate key moments to spot friction, inconsistency, and improvement opportunities.

Touchpoint Optimisation Strategy Planner

Plan tactical enhancements for each touchpoint to boost experience and retention.

Customer Communication Playbook

Standardise messaging, tone, and interactions across channels.

Customer Feedback & Insight Tracker

Capture and analyse feedback specific to key touchpoints for continuous improvement.

Touchpoint Success Metrics & KPI Sheet

Track and measure performance of optimised touchpoints over time.

WHO IS THIS FOR?

- Business owners wanting to deliver more consistent and engaging customer experiences
- Marketing and CX teams responsible for journey mapping and service design
- CX consultants guiding clients to improve touchpoint performance
- Service-based businesses looking to improve conversion, retention, and satisfaction

WHAT YOU'LL BE ABLE TO DO

- Map your entire customer journey with a focus on each touchpoint
- Identify and fix pain points and inconsistencies
- Implement targeted improvements that enhance customer perception and loyalty
- Align internal teams around a shared customer experience vision
- Track results and continuously refine your approach

CUSTOMER TOUCHPOINT MAPPING TEMPLATE

1. JOURNEY STAGES

List your key customer journey stages (e.g., Awareness, Consideration, Purchase, Onboarding, Support, Retention).

1.

2.

3.

4.

5.

6.

2. TOUCHPOINT IDENTIFICATION

For each journey stage, document:

Touchpoint name or description (e.g., Website Visit, Sales Call, Welcome Email)

Channel (Online, In-person, Phone, Email, etc.)

Team/Owner (Marketing, Sales, Customer Support)

3. EXPERIENCE & PAIN POINT ANALYSIS

For each touchpoint:

What is the intended customer experience or goal?

What friction, confusion, or frustration might customers experience?

How consistent and on-brand is this interaction?

4. INTEGRATION & DATA MIGRATION

Which touchpoints have the biggest impact on conversion, retention, or satisfaction?

Which ones need the most urgent improvement?

Brainstorm quick wins vs. longer-term fixes.

5. NEXT STEPS & ACTION PLAN

Assign an owner for each priority touchpoint improvement.

Define timelines and success measures.

Set a review date to revisit and update the map.

TOUCHPOINT PERFORMANCE AUDIT CHECKLIST

1. TOUCHPOINT IDENTIFICATION



Have all key touchpoints been identified for each journey stage?



Have online, offline, and hybrid touchpoints been included?

2. BRAND CONSISTENCY & EXPERIENCE



Is the tone of voice consistent across this touchpoint?



Does the touchpoint reflect brand values visually and verbally?



Is the experience seamless and intuitive for the customer?

3. SPEED & ACCESSIBILITY



Is the response time fast enough to meet customer expectations?



Is the touchpoint accessible to all customers (mobile, desktop, inclusive design)?

4. FRICTION & PAIN POINTS



Are there common complaints or drop-off points linked to this touchpoint?



Is any part of the process confusing, repetitive, or frustrating?



Is handover to other channels or teams clear and smooth?

5. VALUE & RELEVANCE



Does the touchpoint provide clear value to the customer?



Is this interaction necessary, timely, and meaningful?

6. DATA, FEEDBACK & MEASUREMENT



Is this touchpoint currently measured (NPS, CSAT, conversion rate, etc.)?



Is there a way to capture real-time feedback from this interaction?



Are performance metrics reviewed regularly?

7. ACTION & OWNERSHIP



Has ownership of this touchpoint been assigned to a person or team?



Have next steps or improvements been identified and documented?



Is there a follow-up date to review progress?

TOUCHPOINT OPTIMISATION STRATEGY PLANNER

1. TOUCHPOINT DETAILS

Touchpoint Name:

Journey Stage (Awareness, Consideration, Purchase, etc.):

Channel (Online, In-store, Phone, Email, etc.):

2. CURRENT PERFORMANCE & CHALLENGES

What is the current customer experience at this touchpoint?

Are there known pain points, drop-offs, or inconsistencies?

What feedback (if any) has been received?

3. OPPORTUNITY FOR OPTIMISATION

What outcome do you want to improve? (e.g., conversion, CSAT, response time)

What specific changes could enhance this touchpoint?

Are there quick wins vs. longer-term improvements?

4. ACTION PLAN & OWNERSHIP

Action Step 1:

Action Step 2:

Action Step 3:

Touchpoint Owner:

Target Completion Date:

5. METRICS & SUCCESS MEASURES

How will success be measured?

What is the baseline vs. target performance?

How frequently will results be reviewed?

6. REVIEW & NEXT STEPS

Date of last review:

Additional actions or escalations required:

CUSTOMER COMMUNICATION PLAYBOOK

1. BRAND VOICE & TONE GUIDELINES

Define your brand's tone of voice (e.g., friendly, professional, reassuring).

Sample language dos and don'ts for tone consistency.

Adapt tone to channel and context (email vs. chat vs. in-person).

2. STANDARD GREETINGS & INTRODUCTIONS

Email Example: 'Hi [First Name], thank you for getting in touch. I'm [Your Name], here to help you with...'

Phone Example: 'Good morning/afternoon, this is [Your Name] from [Company]. How can I assist you today?'

Chat Example: 'Hello! 🙋 How can I help you today?'

3. HANDLING COMMON CUSTOMER QUERIES

Delivery update response

Refund or cancellation script

Product or service enquiry response

Escalation handover language

4. DIFFICULT CONVERSATIONS & SERVICE RECOVERY

Empathy phrases: 'I understand how frustrating this must be...'

Apology templates: 'We're very sorry this happened. Let me make this right for you...'

Service recovery: Offering solutions, compensation, or escalation.

CUSTOMER COMMUNICATION PLAYBOOK

5. CLOSING & FOLLOW-UP SCRIPTS

Confirm resolution: 'I'm glad we could resolve that for you today. Is there anything else I can help you with?'

Thank you message: 'Thank you for choosing [Company]. We appreciate your business!'

Feedback invitation: 'We'd love to hear how we did—please take a moment to share your feedback.'

6. PERSONALISATION TIPS

Use the customer's name whenever possible.

Reference previous interactions or purchases.

Avoid overly scripted language—keep it human.

7. INTERNAL USE & CONTINUOUS IMPROVEMENT

Encourage team feedback on these scripts.

Regularly update language to reflect brand evolution and customer feedback.

CUSTOMER FEEDBACK & INSIGHT TRACKER

TOUCHPOINT					
DATE OF FEEDBACK					
CUSTOMER NAME OR REF					
FEEDBACK TYPE (POSITIVE/NEUTRAL/NEGATIVE)					
FEEDBACK SOURCE (SURVEY, REVIEW, NPS, CHAT, ETC.)					
FEEDBACK SUMMARY					
SUGGESTED ACTION OR IMPROVEMENT					
OWNER/TEAM RESPONSIBLE					
ACTION STATUS (NOT STARTED/ IN PROGRESS/COMPLETE)					
FOLLOW-UP DATE					

TOUCHPOINT SUCCESS METRICS & KPI SHEET

TOUCHPOINT					
METRIC NAME (E.G., CSAT, NPS, CONVERSION RATE)					
METRIC DESCRIPTION					
CURRENT PERFORMANCE					
TARGET PERFORMANCE					
DATA SOURCE					
FREQUENCY OF REVIEW (WEEKLY, MONTHLY, QUARTERLY)					
OWNER/TEAM					
LAST REVIEWED					
NEXT REVIEW DATE					

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

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