

YOUR CX

**OWN THE EXPERIENCE.
DRIVE THE REVENUE.**

CX LEADERSHIP ISN'T SUPPORT. IT'S STRATEGY. THIS TOOLKIT PROVES IT.

WHAT'S INSIDE THE TOOLKIT?

CX Strategy Canvas Template

Define your strategic priorities, goals, and key customer experience initiatives.

Customer Experience Vision Worksheet Template

Craft a compelling CX vision that aligns with your brand purpose and inspires teams.

CX Maturity Model Template

Assess your current CX capabilities and plan a path to best-in-class performance.

CX Metrics & KPIs Tracker Template

Track key performance indicators across touchpoints, teams, and outcomes.

CX Governance & Team Roles Template

Define ownership, responsibilities, and collaboration structures for CX delivery.

Quarterly CX Leadership Planner Template

Plan initiatives, align cross-functional efforts, and report on strategic progress.

WHO IS THIS FOR?

- Heads of Customer Experience and Chief Customer Officers
- Marketing and Operations leaders tasked with improving CX
- Consultants building CX roadmaps for enterprise clients
- Customer-focused founders seeking to lead by example

WHAT YOU'LL BE ABLE TO DO

- Align your team around a shared CX vision
- Define and communicate strategic goals clearly
- Measure CX impact with practical KPIs
- Map your organisation's CX maturity and plan forward
- Build structure and accountability into your CX leadership

CX STRATEGY CANVAS TEMPLATE

CUSTOMER EXPERIENCE VISION & MISSION:

KEY CUSTOMER SEGEMENTS:

CUSTOMER JOURNEY TOUCH-POINTS:

CUSTOMER EXPERIENCE GOALS & KPIs:

PEOPLE & TEAMS INVOLVED:

TECHNOLOGY & TOOLS:

QUICK WINS:

LONG TERM INITIATIVES:

MEASUREMENT & FEEDBACK LOOPS:

CX 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 MATURITY MODEL TEMPLATE

1 – CULTURE & LEADERSHIP

Level 1 – No clear CX vision or leadership support

Level 2 – Sporadic CX ownership, minimal executive visibility

Level 3 – CX vision exists with growing leadership advocacy

Level 4 – CX embedded in culture, consistent leadership sponsorship

Level 5 – CX is a core organisational value and a CEO priority

2 – CUSTOMER UNDERSTANDING

Level 1 – No structured customer feedback

Level 2 – Basic surveys used inconsistently

Level 3 – Voice of Customer programme in place

Level 4 – Real-time feedback integrated into decisions

Level 5 – Predictive insights drive proactive CX strategies

3 – JOURNEY MAPPING & DESIGN

Level 1 – No journey documentation

Level 2 – One-off journey maps created for projects

Level 3 – Core journeys mapped and shared across teams

Level 4 – Journey design is data-informed and iterative

Level 5 – Journey-led transformation embedded in operations

4 – CX MEASUREMENT & METRICS

Level 1 – No CX metrics tracked

Level 2 – Ad hoc tracking of CSAT or NPS

Level 3 – Regular reporting of key CX metrics

Level 4 – Metrics linked to financial outcomes

Level 5 – CX metrics drive business and investment decisions

5 – CX GOVERNANCE & EXECUTION

Level 1 – No defined CX responsibilities

Level 2 – Informal coordination between functions

Level 3 – CX roles defined, projects tracked

Level 4 – CX governance board reviews progress

Level 5 – Agile CX execution integrated across departments

Current Level (1-5):

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Action To Advance:

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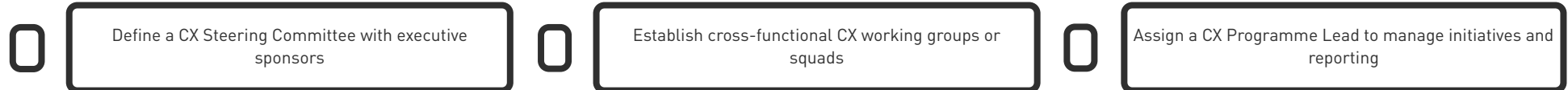
Action To Advance:

CX METRICS & KPIS TRACKER TEMPLATE

METRIC CATEGORY	KPI DESCRIPTION	MEASUREMENT FREQUENCY	TARGET VALUE	CURRENT VALUE	OWNER	NOTES/COMMENTS
CUSTOMER SATISFACTION	Average CSAT from post-interaction surveys	Monthly	85%		CX Manager	
NET PROMOTER SCORE	Likelihood of customers recommending the brand	Monthly	50+		CX Director	
CUSTOMER EFFORT SCORE	Ease of completing a task or solving a problem	Monthly	4.5		Support Lead	
FIRST CONTACT RESOLUTION	Percentage of cases resolved on first contact	Weekly	90%		Support Lead	
CHURN RATE	Percentage of customers who cancel or leave	Monthly	<5%		Retention Analyst	
AVERAGE RESPONSE TIME	Average time to respond to customer queries	Weekly	<1 hour		Support Team	
CUSTOMER LIFETIME VALUE	Revenue earned from a customer over their lifetime	Quarterly	\$2,000		Finance Analyst	
UPSELL/UPGRADE RATE	Rate of customers upgrading or adding new services	Monthly	10%		Sales Manager	
ISSUE RESOLUTION TIME	Average time taken to fully resolve an issue	Weekly	<24 hours		Support Lead	
SOCIAL SENTIMENT	Public perception of brand across social platforms	Monthly	80%+ Positive		Marketing Analyst	

CX GOVERNANCE & TEAM ROLES TEMPLATE

1. CX GOVERNANCE STRUCTURE



2. KEY ROLES AND RESPONSIBILITIES

CHIEF CUSTOMER OFFICER / CX DIRECTOR	CX MANAGER / PROGRAMME LEAD	VOICE OF CUSTOMER ANALYST	JOURNEY OWNER(S)	CX CHAMPIONS / ADVOCATES
<ul style="list-style-type: none">• Owns overall CX strategy and executive reporting• Ensures alignment of CX goals with business strategy	<ul style="list-style-type: none">• Manages implementation of CX roadmap and initiatives• Coordinates between departments and monitors progress	<ul style="list-style-type: none">• Collects and analyses feedback data (NPS, CSAT, CES)• Identifies trends and opportunities for improvement	<ul style="list-style-type: none">• Oversees a specific end-to-end customer journey• Ensures performance metrics and improvement plans are tracked	<ul style="list-style-type: none">• Embedded in teams across the business• Promote best practices and surface CX issues

3. RACI FRAMEWORK (RESPONSIBILITY MATRIX)

Use a RACI model to define who is Responsible, Accountable, Consulted, and Informed for each major CX initiative.

Example: CX Programme Implementation

- Responsible: CX Manager
- Accountable: CX Director
- Consulted: Journey Owners
- Informed: All department heads

QUARTERLY CX LEADERSHIP PLANNER TEMPLATE

1. QUARTERLY CX VISION & PRIORITIES



Define your CX focus for the quarter (e.g. reduce churn, improve onboarding, launch VoC programme)



Align CX goals with company OKRs or business targets

Notes:

2. CROSS-FUNCTIONAL INITIATIVES



List projects involving marketing, support, sales, ops, etc.



Assign initiative owners and establish check-in rhythms

Notes:

3. KEY CX METRICS & TARGETS



List your quarterly metrics (e.g. CSAT, NPS, CES, retention rate)



Define target values and current baseline

Notes:

4. STAKEHOLDER ENGAGEMENT



Schedule stakeholder update sessions and reporting touch-points



Gather department-level input to refine initiatives

Notes:

5. RESOURCE PLANNING & SUPPORT



Confirm required budget, tools, and team resources



Identify training or support needed for frontline staff

Notes:

6. RISKS & MITIGATIONS



Identify potential blockers (e.g. tech, capacity, buy-in)



Define mitigation steps or backup options

Notes:

7. REFLECTIONS & CONTINUOUS IMPROVEMENT



Capture lessons learned at end of quarter



Identify areas for iteration in the next cycle

Notes:

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

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