

Customer Experience Worksheet

Audience Analysis

What do you know about your target audience? List details about demographic, lifestyle, interests, etc.

What information are you missing? List details about gaps in customer data you need to fill in to improve your CX strategy.

How are you planning to access that customer data? Do you have platforms to collect data? Are your customers motivated to share it?

Awareness

How are you building awareness for your brand? List all touch points.

How accessible is your brand? Can customers and prospects connect with you online or on mobile? Why not?

Are there influencers in your channel who could help you build awareness? How could you motivate them to prioritize your brand?

Interest & Education

How are you helping prospects learn more about your brand and value proposition? List all touch points.

What are you doing to make your brand education more engaging? Is your educational material interactive? Do you incorporate gamification?

How well do you follow-up with prospects across their preferred channel(s)? What can you improve?

Evaluation

How well do you differentiate yourself from the competition? How can you expand your value proposition?

How does your pricing match up to the competition? Can you offer more value to help close prospects?

How can you incentivize customers to accelerate sales? Do you give customers compelling incentives to choose you?

Purchases

Do you make it easy for customers to validate their purchase decision? What can you do to make customers feel good about buying from you?

How effective are you at upselling and cross-selling? What can you do to encourage customers to make additional purchases at the point of sale?

At point of sale, are you providing customers a clear plan for growth? When customers make a purchase do they know what their next step(s) are?

Post-Purchase

Do you have a strategy in place to stay top of mind with customers? What platforms would you need to keep customers connected to your brand?

Do you track customer engagement metrics and provide the chance for them to give feedback? Are you using their feedback to improve your customer journey?

Do you have a customer loyalty program? Why or why not?

Re-Purchase

How often do customers repeat purchases? Do you give them a reason to?

How targeted and personalized are your customer promotions? How effective have they been in the past?

How can you turn repeat buyers into brand advocates? What can you offer them to solidify their loyalty?

Loyalty, Advocacy & Referral

How do you retain customers and build loyalty with top accounts? How are you measuring the results?

How can you inspire more customers to advocate your brand? Do you offer incentives for referrals?

How do you plan to improve your loyalty program? It's important to plan for continuous improvement!