

THE 7 STEP PLANNING GUIDE TO

SUCCESSFUL CUSTOMER EXPERIENCE

Improve Customer Satisfaction | Increase Loyalty | Maximize Retention | Measure Your Customer Experience like a Pro

1. **SELECT** the right business goals to impact

When developing your CX plan, it's crucial to start with the business goals and go from there. Use the list to highlight the 3 – 5 business goals that are most actionable and most important to you.

2. **DEFINE** the KPIs that will be used to measure progress and success

Make sure the outputs of your program can be tied directly to an improvement in metrics that impact your business goals. Fill in the amount / growth / percentage of each KPI that is applicable to you.

3. **IDENTIFY** the customer personas you're planning to engage with

Customer personas should represent your ideal customer. Take into consideration demographics, challenges, motivations and business objectives, and write down a description of your ideal persona/s.

4. **MAP** the relevant customer journeys and touchpoints

As you map out your touchpoints, remember that users interact with your brand across multiple channels and flows. Highlight the applicable touchpoints from the examples provided, and add in your own custom ones too.

5. **SELECT** the right customer engagement methods

Decide what type of feedback you want to collect, and how you want to engage. We've provided examples that our customers use in their surveys - select the ones most relevant to you, or add your own in the empty box.

6. **DECIDE** which custom data should be integrated with the feedback you collect

We've listed the most used data solutions based on our customers' experience; mark the ones you'll combine with customer feedback to provide better insights.

7. **CLOSE** the loop with your customer feedback

Take actionable steps after you've captured feedback. See our most effective ways to close the loop with your customer, and highlight the examples that apply to your organization.

GOOD LUCK!

Now you're ready to proceed to the next page to start planning your program



1. Business Goals

Increase Customer Satisfaction
Increase Customer Acquisition
Increase Average Order Value
Improve Customer Value (ARPU)
Increase Customer Lifetime Value
Increase Customer Retention
Increase Overall Sales
Increase Cross-Sales
Increase Business Unit Sales
Improve Retail Performance
Improve Marketing Campaign Performance
Improve Social Media Performance
Improve Customer Reviews and Recommendations
Improve Customer Service
Decrease Customer Service Costs
Accelerate/Improve Product Development
Improve Product Offering
Improve Inventory Management
Improve Operations Efficiency
Improve IT Performance

2. KPIs

Net Promoter Score (NPS)	%
Customer Satisfaction Rating (CSAT)	%
Customer Effort Score (CES)	%
Total Sales	%
Business Unit Sales	%
Cross-Sales	%
New Customers	%
Customer Lifespan	%
Customer Lifetime Value (LTV)	%
Email Open Rate	%
Email Click Rate	%
Task Completion Rate	%
Content Recommendation Click Rate	%
Fan / Follower / Subscriber Growth	%
Clicks from Social Media	%
Time on Site	%
Shopping Cart Abandonment Rate	%
Number of Reviews	%
Number of Phone Support Sessions	%
Number of Email Support Sessions	%
Number of Chat Support Sessions	%
Number of Social Support Sessions	%
Order Return Rate	%
Number of Orders Cancelled	%
Time to Customer Issue Resolution	%
Customer Feedback Click Through Rate	%
Landing Page Click Through Rate	%
Technical Downtime	%
	%
	%

**3. Customer Personas
In order of importance**

Sample Persona: Comparison Shopper Always price sensitive, they research many products and retailers before making a purchase decision.
.....
.....
.....

**4. Customer Journey & Touchpoints
(Ask customers for feedback here)**

Discovery	My Account
Email Campaigns	Order History
Social Media	Contact Preferences
Education	Checkout
Landing Pages	Shipping Information
Product Images	Payment Terms
Product Descriptions	Shopping Cart
Selection	Checkout
Product Searches	Order Confirmation Messages
Product Recommendations	Shipping Confirmation Messages
Promotions and Coupons	Support
Log In	FAQ Pages
Login	Post Support - Email / Chat / Phone / Social
Registration	Customer Communities
Password Reminder / Reset	Multichannel
Other	Web
	Mobile
	Retail Point of Sale

**6. Data Integrations
(Collect this data with your customer feedback)**

CRM Platform - Customer Profile
Customer Support - Ticket Tracking
eCommerce - Shopping Cart State, Total and Item IDs
Social Media Profile - Engagement History, Klout Score
Heatmap Data
Marketing Automation - Customer Profiles
Web Analytics (eg. Google or Adobe Analytics)
In-App Analytics
Mobile Customer Source Data
Customer Login State
Social Analytics Data
Email Analytics Data
Session Recording Data
A/B or Multivariate Test State
IVR Data (Phone Support)
Inventory Management Platform
Digital Media Performance Data
Broadcast Media Performance Data
Print Media Performance Data
Direct Response Media Performance Data

7. Close The Loop

Show suggested links from Knowledge Base
Send an automated, personalized thank you email
Show custom coupons (eg. free shipping) as a Thank You for their feedback to increase your conversion rate
Redirect the customer to a specific URL
Follow up with a personal phone call
Invite the customer to join your beta group and provide feedback on next year's products
Invite the customer to join a private customer community whose members are always given priority support

5. Customer Engagement

Question	How satisfying was your experience with us?
Answer Options:	NPS / CSAT / CES / Custom
Question Type:	Score Ratings

Customer Engagement

Question	Were you able to successfully achieve your task?
Answer Options:	Yes, No, Not Yet
Question Type:	Dropdown, Radio Buttons, Checkbox

Customer Engagement

Question	What was the reason for your engagement today?
Answer Options:	(Specific to touchpoint)
Question Type:	Multiple Choice, Dropdown

Customer Engagement

Question	
Answer Options:	
Question Type:	

Notes: