

Customer Experience Checklist



Yvonne A Jones

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How to Create a Customer Experience System Which Builds Raving Loyal Fans

Creating a customer experience system that meets customer expectations is no longer good enough in our very competitive world.

Business owners and leaders must WOW customers with memorable moments, full of unexpected and unheard-of experiences which turn them into raving fans who can't wait to share your "actions of excellence" with others.

Having a well-thought-out checklist is a great place to start. The checklist can make a world of difference if it is an accumulation of ideas and insights, sourced via a mastermind approach. It would include past and present customers, plus feedback and input from front-line staff who deal with customers daily.

This checklist covers critical areas of excellence that excite, enable, and enthuse customers.



What Is Customer Experience?

"Customer experience is a totality of cognitive, affective, sensory, and behavioral consumer responses during all stages of the consumption process including pre-purchase, consumption, and post-purchase stages." ~ Wikipedia

Create Your Customer Experience Systems

➔ **Map Your System.** Outline the steps that your customer takes from first contact to when she leaves your funnel. Use this map to identify the Standard Operating Procedures (SOP's) that you need to create as a STARTING POINT in your delivery of excellent experiences decisions.

➔ **Leverage technology.** Review your customer service systems and goals. What technologies do you need to succeed? Identify, incorporate, and implement those technologies into your systems. For example, a simple autoresponder can send instant Thank You's to new customers and follow up immediately with contact form inquiries. A ticket system can automate and streamline much of your customer service system.

➔ **Critically Assess your Buying and Checkout Process.** Walk through your current shopping cart and check-out process. Is there anything missing? What can you do to reduce clicks? What improvements can you make so that the customer feels more secure and avoid abandoned shopping carts? Implement those tactics.

➔ **Create a Follow-up Plan.** How will you follow up with customers after a purchase? Map it out and create a plan. For example, will you send a Thank You by email? What about an upsell offer? Can you check in with them a week later for feedback and make anyother special offer?

➔ **Make Customers Feel More Than Appreciated – Make Them Feel Special:** How can you create special moments for your most valuable asset – your customers? Create a plan to help your customers know how grateful you are for their business. Consider sending them Thank You cards, freebies, special offers, promotions, exclusive content, and first dibs on limited products.

➔ **Completely Overhaul Your Delivery:** Look at how you deliver your products. Think like the customers you have yet to attract. What's missing? What needs improvement? How can you deliver your products in a way that surprises your customers? It's not a matter of "over-delivering" but one of looking outside your industry and investing in a customer experience environment that excites both customers and staff alike.

- ➔ **Review Current Refunds and Abandoned Carts.** How many refunds do you currently manage? How many abandoned shopping carts do you have each month? First, take time to discover why. Implement systems and strategies to reduce those occurrences.
- ➔ **Personalize Your Messages.** Even if you choose to outsource and/or automate your customer service, you can personalize it. Give your customer service team scripts and templates to work from. Include sales and marketing messages when relevant. Add your brand and voice to your automated messages. Make sure that your recipient knows the message is from your company. This applies even if you are a company of ONE.
- ➔ **Analyze With a Vengeance.** Once you've set goals to implement your customer experience systems, create a plan to regularly get external and internal feedback on the customer experiences you are providing, and then assess those goals and your new systems. Evaluate success and make changes to improve your business and customer experiences.

Create Your Documentation

- ☑ **Make an FAQ Page:** Write down all of the potential questions a visitor or customer might have about your products or services when they come to your website. Write down all of the questions you receive on a consistent basis. Answer the questions and publish them on your site. Make sure that your visitors and customers are aware of the FAQ page.
- ☑ **Document your policies:** What are your business policies? Consider creating a privacy policy, guarantees, returns, and any other relevant documents. Talk to your attorney to make sure you're covering all your bases, then publish your policies on your website and make sure they're easy to find.

- ☑ **Add your contact form:** Choose a contact form that works best for your website technology and your needs. Add it to your website so that questions can quickly be addressed. You might link to it from your FAQ page as well.
- ☑ **Create your Standard Operating Procedures [SOP's]:** For each task in your customer service system, create a standard operating system. Share the documentation with your support and customer service team.

Exceptional customer experiences are the lynchpin of your company's survival. Use this checklist to work through your customer experience plan from beginning to end and to keep track of everything you need to do to create an exciting, unexpected, and profitable customer experience.

Perspectives

Many business owners understand the need to implement these steps and strategies in their business but find that they get overwhelmed with the daily tasks connected with operating their business. As a result, these strategies and systems very rarely 'get off the ground.' If they do, there's a lack of consistency. This, in turn, creates a negative perception of your brand.

Let's schedule a 30-minute complimentary session to discover which strategies you can get started with as soon as possible. You will leave the call with a plan to achieve your goals in the short term. **Here is a link to my calendar:**

<https://calendly.com/yvonne-6>

After reading through this Checklist, I hope you will see the value of keeping it handy so you can use it as a guide in creating the essential procedures required to deliver exceptional customer experiences that surprise and delight both your customers and your shareholders.

Yvonne A Jones

About Yvonne A Jones

Yvonne A Jones is your Trusted Guide and Mentor in Building Memorable Customer Experiences.

Yvonne specializes in working with Mature Female Online Entrepreneurs who want to grow a sustainable, lucrative, and enjoyable business from wherever they are in the world.

She works with them to uncover hidden talents and discover how to have systems in place to WOW their customers with memorable experiences, enchanting them to become loyal advocates and raving fans.



Yvonne is highly credentialed including mentions on HuffingtonPost.com as one of the "Top 100 Most Social Customer Service Pros on Twitter to Follow", GetApp.com as "One of the Top 15 Most Influential Customer Service Experts to Follow on Twitter" as well as Alignable's Local Business Person of the Year 2020-21 in Lake Wales, Florida.

When she's not working, she's either gardening, reading, listening to music, doing story time with her grandchildren on Zoom, or engaging in various forms of her ministry.

Website:

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Thank You

