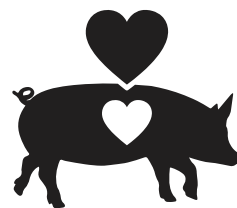


CX Checklist

This Customer Experience Checklist is your go-to tool for fostering a culture of excellence and delivering unforgettable moments to our

customers. It's designed to help leaders and teams align their mindset, communication, and service strategies to build lasting emotional connections with every customer we interact with. Think of it as a living, breathing guide to consistently raise the bar and inspire remarkable service! Focus on creating WOW moments by listening to your customers, personalizing interactions, and staying adaptable as their needs evolve. Regularly revisit your approach to refine strategies and ensure you're delivering remarkable experiences.



**WHAT'S YOUR
BACON?**
MASTER HAPPINESS

MINDSET & CULTURE

Set the Tone!

- ☐ Adopt a customer-first attitude, knowing that every role touches the customer experience.
- ☐ Make sure everyone knows our mission, vision, and core values.
- ☐ Lead with empathy and own your impact.
- ☐ Celebrate team members who go the extra mile!
- ☐ Keep departments talking, no more silos! We're all in this together.

COMMUNICATION SKILLS

Speak Their Language!

- ☐ Practice active listening (not just nodding!).
- ☐ Keep it positive, solution-focused, and friendly.
- ☐ Be consistent in how we talk, post, and respond.
- ☐ Handle tough convos with grace and gratitude.
- ☐ Always follow up, customers should never feel forgotten.

SERVICE DELIVERY

Be the Hero!

- ☐ Review our service standards and live them every day.
- ☐ Role-play tricky customer scenarios with the team.
- ☐ Step up before the customer even asks.
- ☐ Know our stuff: products, services, and all the juicy details.
- ☐ Empower the team to make real-time, feel-good decisions.

ACCESSIBILITY

Make it Easy!

- ☐ Be reachable across all channels, including phone, email, social, and chat.
- ☐ Smooth, simple website and an exceptional mobile experience.
- ☐ Keep info crystal clear (FAQs, hours, directions).
- ☐ Offer flexible options for payments, delivery, scheduling, and more.

OPERATIONS

Smooth and Speedy!

- ☐ Map out the full customer journey and find the friction and bottlenecks.
- ☐ Trim down wait times and long processes.
- ☐ Use tech that supports great service, not hinders it.
- ☐ Continuously tweak and improve behind the scenes.

FEEDBACK

Listen & Level Up!

- ☐ Ask for feedback and make it fun and easy.
- ☐ Share feedback with the team. And YES, even the tough stuff.
- ☐ Keep an eye on our scores: NPS, CSAT, and CES.
- ☐ Let customers SEE the changes they inspired.
- ☐ Shout out wins and use mistakes as learning moments.

EMOTIONAL CONNECTION

Make it Personal!

- ☐ Remember names, preferences, and past conversations.
- ☐ Show real appreciation with little extras like handwritten notes and birthday wishes.
- ☐ Share success stories that warm the heart.
- ☐ Get involved in the community and let customers see our heart.
- ☐ Create little moments of WOW! They matter more than we think!

BE REMARKABLE

What do we do that's worth talking about?
