Customer Experience Improvement Worksheet

A short working page for a local business, nonprofit, or community organization.

1. Choose one moment

Where do people encounter confusion, friction, delay, or an extra step? Choose one moment to look at.

Touchpoint or moment:

2. See it from the visitor's side

What is the person trying to do, understand, or decide at this moment?

What have you observed? What would you want to learn before deciding?

3. Choose one improvement

What is one small, practical change your organization could make at this moment?

What would be different for the person if you made this change?

4. Make a practical next-step plan

First action:

Who will take it? (Optional if working alone.)

When will you take this step?

5. Check back

Afterward, what will you notice or ask to understand how the change went?

Your notes stay on this worksheet. Nothing is submitted through this download.