

Get Clarity & Take Action with the

Customer Experience Leaders'

Reflection &

Planning

Questionnaire



With Jeannie Walters, CCXP &



How to Use This Questionnaire:

This Questionnaire includes 10 total questions designed to help you **reflect** on recent events and **plan** for the immediate future of your **customer experience (CX)** program.

You'll be able to record your answers directly within the questionnaire for easy sharing across your organization.

Completing this exercise alone? Spend a few minutes reflecting on each question that follows, then record your answers.

Resist the urge to overthink your answers or get stuck because crafting a perfect answer requires more research. Record what you can, then share your answers with others in your organization, asking for their input.

Working on this with your team? That's great! Share this questionnaire with everyone who will be involved. For each question, first record your own answers individually, then share your answers as a group.

Working with Jeannie and the Experience Investigators Team? We'll guide your team through each question to help you develop the most useful answers possible and then take action on them.

If you'd like to hire Experience Investigators to facilitate a Reflection & Planning Workshop, simply email Inquire@ExperienceInvestigators.com.

Additional Reflection & Planning Resources:

Articles

- [Customer Experience Planning: Ask These Reflection Questions](#)
- [Customer Experience Planning Questions for a Brighter Future](#)
- [Customer Journey Mapping: Real-World Examples & Use Cases](#)

Videos

- [Ten Questions to Help You Reflect & Plan for a Brighter Future](#)
- [You're 5 Questions from a CX Mission Statement](#)

Courses from Jeannie Walters & LinkedIn Learning

[Customer Experience: Journey Mapping](#)

This course gives organizations a resource to plan their entire customer service program and create maps that reflect each of the customer's touchpoints with your company.

Certified Customer Experience Professional (CCXP) Jeannie Walters shows how to set up a customer journey mapping program for success, introduces tools and techniques to execute the journey mapping process, and explains how to go deeper to test your understanding and take action.

[Learn More](#)

[Customer Experience: Service Blueprinting](#)

Creating a seamless customer experience is no accident. It takes planning and creativity. Service blueprinting is how the best organizations keep their customers coming back.

Blueprinting helps you plan the customer's journey and the employees, processes, and activities to support that journey. This course includes examples and templates to help you blueprint as you go, and tips to connect the dots between what the customer sees and what goes on behind the scenes.

[Learn More](#)

Why Is Reviewing the Past & Planning for the Future Important?

It's easy to get caught up in the day-to-day firefighting of customer experience. Staying there, however, will not serve your strategy or outcomes.

The late science fiction writer **Robert A. Heinlein** summed up this idea in his quote:

“ In the absence of clearly-defined goals, we become strangely loyal to performing daily trivia until ultimately we become enslaved by it.

In more quantitative terms: According to a 2020 report from [Forbes Insights and Arm Treasure Data](#), **83% of 200 CX executives said unimproved customer experience puts their revenue and market share at risk.**

When Should Reflection & Planning Be Done?

Many leaders make the mistake of waiting for the perfect moment to review and plan.

The perfect moment rarely comes, of course.

While the most common time for reflection tends to be the end of the calendar year, there are plenty of other opportunities.

Consider these reflection & planning opportunities...

- The end of the calendar year
- The end of your fiscal year
- As you wrap one quarter and prepare for the next
- Before budgeting season
- Any time changes demand you assess and adjust your goals, strategy, and tactics

5 Reflection Questions:

These questions can help you clarify what happened in the recent past – both good and bad – and to learn from it so you're prepared to take on what comes next.

The following pages include a fill-in-the-blank section to record your own answers.

1 What was our top customer experience priority?
Did we meet it? Why or why not?

2 What was the best thing we heard from customers?

3 What were the best business outcomes we achieved due to our customer experience work?

4 What was the worst thing we heard from customers? How did we earn this criticism? Did we do anything to change this?

5 Did we improve or change the customer's journey for the better? If so, what made that happen? If not, why not?

5 Planning Questions:

It's clear that **planning goals around customer experience improvement is critical**. But how do we go about it in an organized way? Try out these questions to help clarify what actions you'll need to take.

The following pages include a fill-in-the-blank section to record your own answers.

- 1 What is our top customer experience priority?** How is it aligned with our customer experience mission and customer experience success statement?
- 2 What business outcomes** would be worth celebrating?
- 3 How do we want our customers to** feel about their relationship with us? What will they say about our brand?
- 4 What challenges do we need to overcome**, both internally and externally, to achieve more for our customers and our organization? How will we do so?
- 5 How will we make our customer's journey more** effortless, joyful, productive, fun... (use your own adjectives!)

Reflection Questions

1 **What was our top customer experience priority?**
Did we meet it? Why or why not?

What was our top customer experience priority? List your top several, then assign a number to each, from most important (#1) to least important.

For your #1 Priority, answer: Did we meet our goals? Why or why not? _____

What challenges, obstacles, or barriers got in the way? _____

What resources, people or tools were most helpful? Least helpful? _____

Reflection Questions

1

What was our top customer experience priority?

Did we meet it? Why or why not?

Let your answers help you determine:

- If you had clear, prioritized customer experience goals
- If your actions were in line with your priorities
- How resources, people, and tools helped (or hindered) those goals.

Often leaders will get stumped when asked about their customer experience goals because those goals either never really existed in the first place or were vague or not well-defined.

If that describes you... that's okay! Let it serve as an important wake-up call.

If you did have clear, prioritized customer experience goals, use the follow-up questions to help you consider if you need more or less of any resources, people, or tools.

Reflection Questions

2

What was the best thing we heard from customers?

What did customers tell you they loved? List your top several, then assign a number to each, from most frequent (#1) to least frequent.

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

What specific employees, processes or moments did you hear about the most? _____

Celebrate what worked well:

- ✈ Find those **superstar employees** and share the nice words from customers.
- ✈ Praise those **leaders** who created processes that delivered improved experiences.
- ✈ And share how your organization **showed up for customers** in the best possible ways.

Then look for ways to integrate what worked into more of your systems as you move forward.

Reflection Questions

3

What were the best business outcomes we achieved due to our CX work?

What were the best business outcomes we achieved due to our work in customer experience? List your top several, then assign a number to each, from most impactful (#1) to least impactful. These shouldn't be CX-specific outcomes, but larger organizational goals.

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Look for specific business outcomes:

- Did a higher Net Promoter Score (NPS) lead to an **increase in retention**?
- Did a digital experience lead to delivering to **more customers** than last year at this time?
- Did better customer onboarding materials lead to **reduced call center costs**?

Then share these connections to encourage the buy-in of leaders and cross-departmental teams.

If you can't connect your CX work to business results, ask:

Is there information you don't have access to that would make this easier? _____

Are there leaders who aren't engaged with the work around improving the customer experience who should be? _____

Reflection Questions

4 What was the worst thing we heard from customers? How did we earn this criticism? Did we do anything to change this?

What did customers tell you they were disappointed, frustrated, or inconvenienced by?

List the top several, then assign a number to each, from most frequent (#1) to least frequent.

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

What changes were made to address these complaints? _____

How did you 'close the loop' with customer who had issues? _____

How were these communicated to leaders in a way that conveyed the impact of these issues on customer loyalty, ratings, or likelihood to make future purchases? _____

Reflection Questions

4 What was the worst thing we heard from customers? How did we earn this criticism? Did we do anything to change this?

Complaints from customers are a warning flag.

Are you paying attention to the warning or just deciding to move on without considering what's really happening?

- Look for opportunities in which customer complaints can lead to **real change in your systems** to prevent future similar complaints.
- **"Close the loop" with customers** by thanking them for their feedback and letting them know about the changes they've helped spur within your organization.
- Share these hard truths with the rest of the organization – **not as a punishment, but as a chance to learn, improve, and grow.**

If your organization has a habit of solving each individual complaint and then moving on, you're only doing half your job.

Reflection Questions

5 Did we improve or change the customer's journey for the better? If so, what made that happen? If not, why not?

What improvements to the customer journey did we deliver? _____

What did we do internally to make those improvements happen? _____

How are our teams supporting one another's efforts? _____

Customer experience is a team sport.

Cross-functional leadership and support are needed to make these improvements.

Let your answers to these questions help you identify those leaders and teams that deserve your thanks for putting in the efforts to make the changes that really mattered to customers.

If you can't identify improvements, this is a great opportunity to demonstrate the importance of cross-functional leadership.

Next Up: 5 Planning Questions!

Planning Questions

1

What is our top customer experience priority? How is it aligned with our customer experience mission and customer experience success statement?

What is our Customer Experience Mission Statement?* _____

What is our Customer Experience Success Statement?* _____

What are the top CX priorities we've identified for the immediate future? List your top several, then assign a number to each, from most important (#1) to least important.

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Do our top priorities align with our CX Mission Statement and Success Statement?

How so or how not? _____

* Not sure what these statements are? We explain on the next page.

Planning Questions

1 What is our top customer experience priority? How is it aligned with our customer experience mission and customer experience success statement?

Does everything feel like a top priority?

Executives often share with us how they struggle with identifying the TOP priority because there are just so many. That's precisely why truly understanding top priorities is so important.

A great way to prioritize is to assess what priorities most align with your **CX Mission Statement** and **CX Success Statement**.

These two statements provide that “North Star” for considering priorities:

- **Your CX Mission Statement** is a guiding statement for your organization around what the experience should be for each customer, every time.
- **Your CX Success Statement** identifies what CX success looks like in your organization: What outcomes are most meaningful, how these outcomes relate back to larger organizational goals, and the metrics you'll use to measure success.

Once you have those defined, you can start seeing how to prioritize CX needs.

Let your answers to these questions help you identify those leaders and teams that deserve your thanks for putting in the efforts to make the changes that really mattered to customers.

If you can't identify improvements, this is a great opportunity to demonstrate the importance of cross-functional leadership.

Need a hand creating or improving your CX Mission Statement?

Read our introductory article:

[Why a CX Mission Statement Matters — And How to Create One](#)

Get the interactive resource:

[Customer Experience Mission Statement Workbook](#)

Need a hand creating or improving your CX Success Statement?

Read our introductory article:

[Want Greater CX Success? Build Your CX Success Statement](#)

Get the interactive resource:

[Customer Experience Success Statement Workbook](#)

Planning Questions

2

What business outcomes would be worth celebrating?

What outcomes would be thrilling to report at the end of the quarter, year or milestone?

List your top several, then assign a number to each from most easily attainable (#1) to least.

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

How would leadership respond to reaching these outcomes? _____

What would you do to celebrate the people on your team and in key roles who helped your organization reach these outcomes? _____

Think through these specific outcomes in detail.

Then, share them with your team and key stakeholders to get them motivated and on board.

Planning Questions



How do we want our customers to feel about their relationship with us? What will they say about our brand?

Where are the potential moments when your product or service saves your customer time, effort, money, or frustration? List your top several, then assign a number to each from most easily attainable (#1) to least.

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

What emotional responses would you like customers to have in those moments? _____

What would you like these customers to say when asked about your brand? _____

Define what it looks like when customers achieve their goals because of your brand.

Predict what quotes you'll hear throughout the year when things go RIGHT.

Focus on those as a way to set intentions around the emotions you want to create for your customers.

Planning Questions

4 **What challenges do we need to overcome**, both internally and externally, to achieve more for our customers and our organization? How will we do so?

Go back to Reflection Question #1 to review the top challenges, obstacles, or barriers you faced recently. Which of these do you anticipate continuing to be a challenge in the future? _____

For each of these challenges, what can you do to address them? You may not be able to solve them completely, but there's almost always a way to make an improvement.

Not sure what obstacles your organization faces?

Here are some of the most common challenges. How many sound familiar? Ask:

- Are leaders communicating in ways to help connect the insights gathered from customers into action?
- Is there a clearly defined, cross-functional team to help drive the actions required?
- Do customers have enough ways to share their feedback with us? Do we close the loop with them?
- Is there transparency inside our organization and to customers regarding the supply chain, delivery options, and more?
- Are there basic steps in the customer journey we all acknowledge are bad for the customer?

Planning Questions

5

How will we make our customer's journey more... effortless, joyful, productive, fun... (use your own adjectives!)

How do you want your customers to describe their experience with you? List as many adjectives as you can. If it's helpful, refer back to planning question #3 on page 17. _____

For each of these adjectives, what can you do deliver? First, enter one of your adjectives from above. Then, tie an action or a moment in the journey directly to that adjective.

Adjective

Action/Moment

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

What promises have you made to customers?

If you're feeling stuck, this is another spot where a Customer Experience Mission Statement can be really helpful.

Because your CX Mission clearly states what you've promised to customers, you can use it to get a clear idea of what they expect to experience and feel.

[Get the Customer Experience Mission Statement Workbook here.](#)

Great Work! What's Next?

Share & collaborate with your team

If you answered these questions on your own, make sure to share your ideas across the organization and ask for their input too.

Take action!

Feeling overwhelmed by all the new information that's come to light? **Ask one more question: "What's one thing we can take action on first?"**

You don't have to revamp your CX program in a day. Just keep taking action to move forward.

When you're ready to take the next step...

Jeannie and the Experience Investigators Team are here for you.

Email Inquire@ExperienceInvestigators.com to discuss custom workshops, consulting, & keynotes — in-person and virtual.

Explore other resources from Experience Investigators:

[Learn About Remote Workshopping, Training, & Consulting](#)

[Join the Free 21-Day CX Challenge](#)

[Explore Jeannie's LinkedIn Learning Courses](#)

Or find more at ExperienceInvestigators.com.



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