

Customer Touchpoints | WORKSHEET



Name _____

Date _____

Step 1: Check all customer touchpoints that apply to your business.

| Before Purchase | During Purchase | After Purchase |
|---|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Website <input type="checkbox"/> Social media <input type="checkbox"/> Staff or sales team (in-person, phone, email) <input type="checkbox"/> Advertising <input type="checkbox"/> Marketing and branding <input type="checkbox"/> Digital marketing content <input type="checkbox"/> Product catalog / brochure <input type="checkbox"/> Ratings and reviews <input type="checkbox"/> Testimonials <input type="checkbox"/> Word of mouth / referral <input type="checkbox"/> Community involvement <input type="checkbox"/> Company events <input type="checkbox"/> Company sponsorships <input type="checkbox"/> Other _____ <input type="checkbox"/> Other _____ | <ul style="list-style-type: none"> <input type="checkbox"/> Website <input type="checkbox"/> Online chat/chat bot <input type="checkbox"/> Brick & mortar store <input type="checkbox"/> In-office <input type="checkbox"/> In-home <input type="checkbox"/> Staff or sales team <input type="checkbox"/> Phone interaction <input type="checkbox"/> Product catalog <input type="checkbox"/> Point-of-sale (POS) <input type="checkbox"/> Promotion <input type="checkbox"/> Coupon redemption <input type="checkbox"/> Other _____ <input type="checkbox"/> Other _____ | <ul style="list-style-type: none"> <input type="checkbox"/> Shipping confirmation & tracking <input type="checkbox"/> Transactional emails <input type="checkbox"/> Returns or exchanges <input type="checkbox"/> Customer service, support, success team <input type="checkbox"/> Billing <input type="checkbox"/> Thank-you card or email <input type="checkbox"/> Personal follow up <input type="checkbox"/> Customer on-boarding <input type="checkbox"/> Customer satisfaction or feedback survey <input type="checkbox"/> Online help center <input type="checkbox"/> Customer loyalty program <input type="checkbox"/> Marketing emails <input type="checkbox"/> Other _____ <input type="checkbox"/> Other _____ |

Step 2: Consider the following attributes for each customer touchpoint:

- a. Frequency – how often is the touchpoint encountered by your customers?
- b. Size of audience – what percentage of your customers encounter the touchpoint?
- c. Intensity of interaction – what is the potential for an impactful customer interaction?

Step 3: Prioritize touchpoints at each stage for exploration and feedback.

| Priority | Touchpoint | Priority | Touchpoint | Priority | Touchpoint |
|----------|------------|----------|------------|----------|------------|
| 1. | _____ | 1. | _____ | 1. | _____ |
| 2. | _____ | 2. | _____ | 2. | _____ |
| 3. | _____ | 3. | _____ | 3. | _____ |
| 4. | _____ | 4. | _____ | 4. | _____ |
| 5. | _____ | 5. | _____ | 5. | _____ |
| 6. | _____ | 6. | _____ | 6. | _____ |
| 7. | _____ | 7. | _____ | 7. | _____ |
| 8. | _____ | 8. | _____ | 8. | _____ |
| 9. | _____ | 9. | _____ | 9. | _____ |
| 10. | _____ | 10. | _____ | 10. | _____ |