

FREE CUSTOMER EXPERIENCE TEMPLATE

Customer Experience Checklist

Use this 60-point checklist to review the complete customer journey across arrival, greeting, needs discovery, product or service guidance, availability, speed, environment, checkout, service recovery, feedback, and corrective action.

Store / location

Review date

Daypart / journey

Reviewer / manager

1. Customer experience setup, location context, service standards, ownership, and priorities

- 1** Confirm the location, date, daypart, reviewer, store manager, service format, customer journey, departments, and service points included in the review.

CUSTOMER EXPERIENCE

REVIEWER / MANAGER

Enter

DATE / TIME

Enter

SIGN-OFF

Sign

● Execution tip: Start with recent feedback and problem areas. Customer experience improves faster when the checklist focuses attention on the moments customers already say are breaking.

- 2** Verify the team has the current customer-service standards, response-time targets, brand behaviours, escalation rules, and customer policies relevant to the location.

CUSTOMER EXPERIENCE

Journey stage	Score	Evidence	Owner	Action
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● Execution tip: Start with recent feedback and problem areas. Customer experience improves faster when the checklist focuses attention on the moments customers already say are breaking.

- 3** Review recent customer complaints, low ratings, returns, service failures, queue issues, stock concerns, recurring feedback, and open customer-experience actions.

CRITICAL

CUSTOMER EXPERIENCE

Journey stage	Score	Evidence	Owner	Action
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● Execution tip: Start with recent feedback and problem areas. Customer experience improves faster when the checklist focuses attention on the moments customers already say are breaking.

- 4** Identify the highest-impact customer moments for the location, such as arrival, greeting, needs discovery, product availability, service speed, checkout, delivery, or issue resolution.

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Start with recent feedback and problem areas. Customer experience improves faster when the checklist focuses attention on the moments customers already say are breaking.

- 5** Confirm critical customer-experience failures are defined for the business, such as discriminatory treatment, major hygiene or safety concerns, severe service refusal, or unresolved payment or order failure.

CRITICAL

CUSTOMER EXPERIENCE

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Start with recent feedback and problem areas. Customer experience improves faster when the checklist focuses attention on the moments customers already say are breaking.

- 6** Assign ownership for customer service, staffing, product availability, checkout, cleanliness, facilities, digital touchpoints, complaint handling, and corrective-action closure.

CUSTOMER EXPERIENCE

Journey stage	Score	Evidence	Owner	Action
---------------	-------	----------	-------	--------

● Execution tip: Start with recent feedback and problem areas. Customer experience improves faster when the checklist focuses attention on the moments customers already say are breaking.

2. Arrival, storefront, accessibility, first impression, and customer orientation

- 7 Check the storefront, entrance, windows, signage, lighting, access routes, parking or pickup approach, and surrounding area create a clean and professional first impression.**

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Walk the arrival journey as a first-time customer. The store should be easy to enter, understand, and navigate without insider knowledge.

- 8 Verify customer pathways, ramps, steps, doors, mats, handrails, carts, baskets, and other access points are usable and free from avoidable obstruction.**

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Walk the arrival journey as a first-time customer. The store should be easy to enter, understand, and navigate without insider knowledge.

- 9 Confirm opening hours, service notices, queue guidance, promotional communication, directional signs, and other important customer information are current and easy to understand.**

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Walk the arrival journey as a first-time customer. The store should be easy to enter, understand, and navigate without insider knowledge.

- 10 Assess whether customers can quickly understand where to go for shopping, service, pickup, returns, payment, fitting rooms, restrooms, or other key needs.**

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Walk the arrival journey as a first-time customer. The store should be easy to enter, understand, and navigate without insider knowledge.

- 11 Check entrance displays, glass, decals, signage, fixtures, bins, and customer-facing arrival areas are clean, maintained, and aligned with brand standards.**

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Walk the arrival journey as a first-time customer. The store should be easy to enter, understand, and navigate without insider knowledge.

- 12 Record anything that creates confusion, poor first impression, blocked access, unclear navigation, or reduced confidence before the customer begins the main interaction.**

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Walk the arrival journey as a first-time customer. The store should be easy to enter, understand, and navigate without insider knowledge.

3. Greeting, acknowledgement, employee presentation, attentiveness, and approachability

- 13 Verify customers are acknowledged within the expected service window when entering, approaching a service point, or waiting for assistance.**

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

- Execution tip: Score observable behaviour rather than personality. Focus on acknowledgement, tone, attentiveness, presentation, and customer-facing conduct you can describe objectively.

- 14 Check greetings feel polite, natural, and appropriate to the brand and customer situation rather than indifferent, rushed, or overly scripted.**

CUSTOMER EXPERIENCE

ACTUAL TIME

Enter

TARGET

Enter

STATUS

Record

- Execution tip: Score observable behaviour rather than personality. Focus on acknowledgement, tone, attentiveness, presentation, and customer-facing conduct you can describe objectively.

- 15 Confirm employee uniform, grooming, hygiene, name badge, identification, and other customer-facing presentation standards are met.**

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

- Execution tip: Score observable behaviour rather than personality. Focus on acknowledgement, tone, attentiveness, presentation, and customer-facing conduct you can describe objectively.

- 16 Observe eye contact, tone, posture, attentiveness, body language, and whether employees appear available and willing to help.**

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

- Execution tip: Score observable behaviour rather than personality. Focus on acknowledgement, tone, attentiveness, presentation, and customer-facing conduct you can describe objectively.

- 17 Check waiting customers are acknowledged when employees are busy and receive a realistic indication of when assistance will be available.**

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

- Execution tip: Score observable behaviour rather than personality. Focus on acknowledgement, tone, attentiveness, presentation, and customer-facing conduct you can describe objectively.

- 18 Record ignored customers, inappropriate phone use, personal conversations, dismissive behaviour, poor presentation, or other conduct that weakens trust.**

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

- Execution tip: Score observable behaviour rather than personality. Focus on acknowledgement, tone, attentiveness, presentation, and customer-facing conduct you can describe objectively.

4. Needs discovery, product or service knowledge, recommendations, and communication quality

- 19 Check employees ask useful questions to understand the customer's need, purpose, preference, budget, urgency, size, quantity, or other relevant requirements.**

CRITICAL

CUSTOMER EXPERIENCE

Journey stage	Score	Evidence	Owner	Action

● Execution tip: Ask whether the customer received clear and useful guidance, not simply whether an employee spoke to them. Good service helps the customer make a confident decision.

- 20 Verify employees listen to the customer's answers and use that information to guide recommendations rather than immediately offering a generic option.**

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Ask whether the customer received clear and useful guidance, not simply whether an employee spoke to them. Good service helps the customer make a confident decision.

- 21 Assess product, service, menu, policy, promotion, feature, ingredient, stock, warranty, delivery, or category knowledge relevant to the customer interaction.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Ask whether the customer received clear and useful guidance, not simply whether an employee spoke to them. Good service helps the customer make a confident decision.

- 22 Confirm explanations are accurate, simple, and easy for customers to understand without unnecessary jargon or unsupported claims.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Ask whether the customer received clear and useful guidance, not simply whether an employee spoke to them. Good service helps the customer make a confident decision.

- 23 Check employees offer suitable alternatives when the preferred product, size, service, option, timing, or stock is unavailable.**

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Ask whether the customer received clear and useful guidance, not simply whether an employee spoke to them. Good service helps the customer make a confident decision.

- 24 Record incorrect information, visible uncertainty, weak recommendation logic, unnecessary handoffs, overpromising, or missed opportunities to help the customer decide.**

CRITICAL

CUSTOMER EXPERIENCE

Journey stage	Score	Evidence	Owner	Action

● Execution tip: Ask whether the customer received clear and useful guidance, not simply whether an employee spoke to them. Good service helps the customer make a confident decision.

5. Product availability, merchandising, pricing, information, and shopping confidence

- 25 Verify priority products, advertised items, promoted services, core assortment, and other customer-critical offers are available or supported by a clear alternative.**

CRITICAL

CUSTOMER EXPERIENCE

Meets standard

Needs action

Critical

EVIDENCE

Add

- Execution tip: Treat availability, pricing, and product information as part of the customer experience. Customers experience these gaps directly even when the underlying cause is operational.

- 26 Check shelves, displays, racks, counters, menus, promotional units, or digital screens are organized, easy to browse, and visually consistent.**

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

- Execution tip: Treat availability, pricing, and product information as part of the customer experience. Customers experience these gaps directly even when the underlying cause is operational.

- 27 Confirm prices, product labels, service information, promotional terms, offer dates, and customer-facing descriptions are current, readable, and internally consistent.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

- Execution tip: Treat availability, pricing, and product information as part of the customer experience. Customers experience these gaps directly even when the underlying cause is operational.

- 28 Check products and customer-facing items are clean, undamaged, correctly arranged, sufficiently stocked, and free from obvious quality or presentation defects.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

- Execution tip: Treat availability, pricing, and product information as part of the customer experience. Customers experience these gaps directly even when the underlying cause is operational.

- 29 Verify out-of-stock products, unavailable services, delayed orders, or substitute options are communicated clearly so customers know what to expect.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

- Execution tip: Treat availability, pricing, and product information as part of the customer experience. Customers experience these gaps directly even when the underlying cause is operational.

- 30 Record missing prices, poor presentation, unavailable promoted products, confusing information, empty displays, or other issues that reduce purchase confidence.**

CRITICAL

CUSTOMER EXPERIENCE

Meets standard

Needs action

Critical

EVIDENCE

Add

- Execution tip: Treat availability, pricing, and product information as part of the customer experience. Customers experience these gaps directly even when the underlying cause is operational.

6. Service execution, speed, queue management, accuracy, and handoffs

- 31 Observe whether the customer journey follows the expected process from enquiry or selection through service, preparation, order, checkout, pickup, delivery, or completion.**

CRITICAL

CUSTOMER EXPERIENCE

ACTUAL TIME

Enter

TARGET

Enter

STATUS

Record

● Execution tip: Measure the stages that create waiting. A single total service time can hide whether the real problem is queueing, preparation, handoff, or checkout.

- 32 Measure or estimate waiting time, queue movement, service time, preparation time, or response time where the customer standard includes a timing expectation.**

CRITICAL

CUSTOMER EXPERIENCE

ACTUAL TIME

Enter

TARGET

Enter

STATUS

Record

● Execution tip: Measure the stages that create waiting. A single total service time can hide whether the real problem is queueing, preparation, handoff, or checkout.

- 33 Check the customer's order, request, customization, quantity, product, service detail, name, or other instruction is captured accurately the first time.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Measure the stages that create waiting. A single total service time can hide whether the real problem is queueing, preparation, handoff, or checkout.

- 34 Verify handoffs between employees, departments, counters, channels, or service stages are smooth and do not force the customer to repeat information unnecessarily.**

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Measure the stages that create waiting. A single total service time can hide whether the real problem is queueing, preparation, handoff, or checkout.

- 35 Check employees explain delays, unavailable options, additional steps, or service limitations clearly and set realistic expectations.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Measure the stages that create waiting. A single total service time can hide whether the real problem is queueing, preparation, handoff, or checkout.

- 36 Record avoidable waiting, repeated corrections, order errors, poor coordination, unclear ownership, missed updates, or other service-process breakdowns.**

CRITICAL

CUSTOMER EXPERIENCE

Journey stage

Score

Evidence

Owner

Action

● Execution tip: Measure the stages that create waiting. A single total service time can hide whether the real problem is queueing, preparation, handoff, or checkout.

7. Cleanliness, comfort, ambience, facilities, maintenance, and customer environment

- 37** Check floors, counters, tables, seating, shelves, fitting rooms, service points, checkout areas, touchpoints, and other customer-facing spaces are clean and maintained.

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Judge the environment from the customer's normal line of sight and touchpoints. Prioritize conditions that affect comfort, trust, and willingness to stay.

- 38** Verify restrooms or customer wash areas, where applicable, are clean, odour-free, stocked, and comfortable to use.

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Judge the environment from the customer's normal line of sight and touchpoints. Prioritize conditions that affect comfort, trust, and willingness to stay.

- 39** Assess lighting, temperature, ventilation, music, noise, odour, crowding, seating, and overall ambience from a normal customer perspective.

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Judge the environment from the customer's normal line of sight and touchpoints. Prioritize conditions that affect comfort, trust, and willingness to stay.

- 40** Confirm bins, cleaning tools, cartons, stock, maintenance equipment, employee belongings, and other operational items do not create visible clutter in customer areas.

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Judge the environment from the customer's normal line of sight and touchpoints. Prioritize conditions that affect comfort, trust, and willingness to stay.

- 41** Check visible food, beverage, beauty, sampling, preparation, or hygiene-sensitive areas follow the required customer-facing hygiene standards where applicable.

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Judge the environment from the customer's normal line of sight and touchpoints. Prioritize conditions that affect comfort, trust, and willingness to stay.

- 42** Record cleanliness, odour, maintenance, comfort, lighting, temperature, damaged-fixture, or ambience issues that materially reduce customer confidence or comfort.

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Judge the environment from the customer's normal line of sight and touchpoints. Prioritize conditions that affect comfort, trust, and willingness to stay.

8. Checkout, payment, loyalty, receipt, packaging, and transaction close

- 43 Verify the checkout or payment process is easy to understand, professional, and completed without avoidable delay.**

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: The transaction close shapes the final impression. Check accuracy and efficiency, but also whether the customer leaves knowing what happens next.

- 44 Check the correct item, quantity, price, discount, promotion, tax, fee, loyalty treatment, or other charge appears on the transaction where the customer can reasonably verify it.**

CUSTOMER EXPERIENCE

CRITICAL

ACTUAL TIME

Enter

TARGET

Enter

STATUS

Record

● Execution tip: The transaction close shapes the final impression. Check accuracy and efficiency, but also whether the customer leaves knowing what happens next.

- 45 Confirm payment options expected by the location work reliably and that employees can support common payment questions or failures.**

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: The transaction close shapes the final impression. Check accuracy and efficiency, but also whether the customer leaves knowing what happens next.

- 46 Check loyalty, membership, warranty, return, delivery, collection, or other relevant customer information is explained when it adds value or is required by the service process.**

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: The transaction close shapes the final impression. Check accuracy and efficiency, but also whether the customer leaves knowing what happens next.

- 47 Verify the customer receives the expected receipt, invoice, order confirmation, token, packaging, collection reference, or other proof of transaction.**

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: The transaction close shapes the final impression. Check accuracy and efficiency, but also whether the customer leaves knowing what happens next.

- 48 Assess whether the interaction closes positively with confirmation, thanks, next steps, invitation to return, or another brand-appropriate closing rather than ending abruptly.**

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: The transaction close shapes the final impression. Check accuracy and efficiency, but also whether the customer leaves knowing what happens next.

9. Complaints, service recovery, returns, escalation, ownership, and customer trust

- 49** Verify employees listen fully to complaints, concerns, return requests, order problems, delays, defects, or service failures before responding.

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Service recovery is a major trust moment. The goal is not only to resolve the issue, but to make ownership and next steps clear to the customer.

- 50** Check employees remain calm, respectful, and professional and avoid blaming the customer, colleague, supplier, system, or policy unnecessarily.

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Service recovery is a major trust moment. The goal is not only to resolve the issue, but to make ownership and next steps clear to the customer.

- 51** Confirm available options, policy, next steps, limitations, and expected resolution timing are explained clearly.

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Service recovery is a major trust moment. The goal is not only to resolve the issue, but to make ownership and next steps clear to the customer.

- 52** Verify issues outside frontline authority are escalated promptly to the right owner without forcing the customer to restart the explanation.

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Service recovery is a major trust moment. The goal is not only to resolve the issue, but to make ownership and next steps clear to the customer.

- 53** Check service recovery restores confidence through clear ownership, appropriate acknowledgement or apology, practical action, realistic timing, and follow-through.

CUSTOMER EXPERIENCE

CRITICAL

Excellent

Partial

Failed

N/A

● Execution tip: Service recovery is a major trust moment. The goal is not only to resolve the issue, but to make ownership and next steps clear to the customer.

- 54** Record dismissive behaviour, policy confusion, repeated handoffs, poor escalation, unresolved frustration, or other service-recovery failures requiring corrective action.

CUSTOMER EXPERIENCE

CRITICAL

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Service recovery is a major trust moment. The goal is not only to resolve the issue, but to make ownership and next steps clear to the customer.

10. Feedback, overall experience, action closure, trends, management review, and sign-off

- 55 Assess the overall customer experience across the full journey, considering consistency rather than allowing one isolated moment to dominate the result.**

CRITICAL

CUSTOMER EXPERIENCE

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Convert recurring experience gaps into action. Trend findings by store, journey stage, daypart, issue type, and root cause so repeat problems become visible.

- 56 Record the strongest positive customer-experience observation and the most important improvement opportunity with specific evidence.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Convert recurring experience gaps into action. Trend findings by store, journey stage, daypart, issue type, and root cause so repeat problems become visible.

- 57 Confirm failed or low-scoring checks include enough detail for the responsible manager to understand what happened, where it happened, and why it affected the customer.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Convert recurring experience gaps into action. Trend findings by store, journey stage, daypart, issue type, and root cause so repeat problems become visible.

- 58 Assign meaningful customer-experience gaps to a named owner with priority, due date, expected correction, evidence requirement, and verification responsibility.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Convert recurring experience gaps into action. Trend findings by store, journey stage, daypart, issue type, and root cause so repeat problems become visible.

- 59 Review recurring complaint themes, queue issues, product availability gaps, checkout problems, cleanliness concerns, service delays, and repeat low scores for systemic improvement.**

CRITICAL

CUSTOMER EXPERIENCE

Excellent

Partial

Failed

N/A

● Execution tip: Convert recurring experience gaps into action. Trend findings by store, journey stage, daypart, issue type, and root cause so repeat problems become visible.

- 60 Record the final customer-experience status, unresolved critical issues, action status, next review date, reviewer, store manager, customer-experience owner, date, time, and sign-off.**

CRITICAL

CUSTOMER EXPERIENCE

Meets standard

Needs action

Critical

EVIDENCE

Add

● Execution tip: Convert recurring experience gaps into action. Trend findings by store, journey stage, daypart, issue type, and root cause so repeat problems become visible.

RUN THIS CHECKLIST DIGITALLY

Turn customer experience checks into measurable service improvement

Use Taqtics to schedule customer-experience checks, capture live evidence, compare journey scores, assign corrective actions, verify improvement, and identify recurring service gaps across every location.