**Customer Touchpoint Planning   
Table 2: Touchpoints Identification, Review and Improvements**

To use this table, please read my ‘Customer Touchpoint Planning’ blog, here, if you haven’t already done so.   
This is the second of two free templates available for you to download and customise to assist you with your Customer Touchpoint Planning.   
The first free template available is ‘Table 1: Our Touchpoints’, which you should complete before this Table 2. Download Table 1 here.   
If you have any questions or would like to book a consultation, please contact me here.   
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**Review Completed By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Review: \_\_\_\_/\_\_\_\_/\_\_\_\_\_\_**

**KEY:** This key will allow you to match the example information we have entered into the template to the steps listed on our blog.

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| **Step 1** | **Step 2** | **Step 3** | **Step 4** | **Step 5** |

**Notes:**

1. There are 3 pages with ***examples highlighted like this***. We have deliberately omitted information in the “Improvements” sections.
2. There are 2 blank template pages following the 3 example pages.
3. The review questions (aka General Questions - GQs) should remain as they are, however, the touchpoint-specific questions (TSs) are for you to create, as they are specific to the touchpoints you identify.

**Review Questions (General Questions)**

GQ 1: What is the message you give via this touchpoint?

GQ 2: Is your message consistent with your values and brand story?

GQ 3: Is each and every customer getting the quality of service they expect, and you are striving to provide?

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| **Before Purchase / Engaging with Service** | **During Purchase / Engaging with Service** | **After Purchase / Engaging with Service** |
| |  |  | | --- | --- | | **Touchpoint** | ***Search Engine Search*** | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1: Was your business easy to find? **⌧** | | **Pain Point** | ***Not showing on first page of results*** | | **Improvements** |  | | |  |  | | --- | --- | | **Touchpoint** | ***Website (online order)*** | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1: Is the online ordering process easy to understand and complete? **⌧** | | **Pain Point** | ***When you click to add a product to the cart, you’re not asked quantity*** | | **Improvements** |  | | |  |  | | --- | --- | | **Touchpoint** | I***nvoicing/Billing*** | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1: Is the customer billed promptly? **☑**  TS 2: Is it easy to understand? **⌧** | | **Pain Point** | ***Packing slips mistaken as invoices*** | | **Improvements** |  | |
| **Before Purchase / Engaging with Service** | **During Purchase / Engaging with Service** | **After Purchase / Engaging with Service** |
| |  |  | | --- | --- | | **Touchpoint** | ***Looking in Local Service Directory*** | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1: Does your advertisement inspire potential customers to contact you? **⌧** | | **Pain Point** | ***We don’t advertise in the local directory*** | | **Improvements** |  | | |  |  | | --- | --- | | **Touchpoint** | ***Salesperson (in-store)*** | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1: Were they acknowledged upon entering the store? **⌧**  TS 2: Were they served quickly, efficiently, and professionally? 𐄂 | | **Pain Point** | ***We acknowledge customers when we think they need assistance, not on arrival*** | | **Improvements** |  | | |  |  | | --- | --- | | **Touchpoint** | ***Follow-Up*** | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1: Have you followed up with the customer, e.g. have they received their product and happy with it/was your provision of services to their expectations? **⌧** | | **Pain Point** | ***We do not routinely follow-up*** | | **Improvements** |  | |

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| **Before Purchase / Engaging with Service** | **During Purchase / Engaging with Service** | **After Purchase / Engaging with Service** |
| |  |  | | --- | --- | | **Touchpoint** | ***Receives Mailer*** | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1: Does your mailer consider the audience receiving the mailer e.g. age appropriate? **⌧** | | **Pain Point** | ***Mailer not targeted at the right age group/ demographic*** | | **Improvements** |  | | |  |  | | --- | --- | | **Touchpoint** | ***Tradesperson (on-site)*** | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1: Was the vehicle clean, tidy, and signwritten? **⌧**  TS 2: How did they conduct themselves on-site? **⌧** | | **Pain Point** | ***Vehicle not signwritten so customer cannot confirme we are who we say we are. Tradesperson went straight to do job, did not introduce themselves*** | | **Improvements** |  | | |  |  | | --- | --- | | **Touchpoint** | ***Social Media*** | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1: Can the customer post a review on Facebook? **⌧** | | **Pain Point** | ***We do not update our Facebook regularly, or allow reviews*** | | **Improvements** |  | |

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| **Before Purchase / Engaging with Service** | **During Purchase / Engaging with Service** | **After Purchase / Engaging with Service** |
| |  |  | | --- | --- | | **Touchpoint** |  | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1:  𐄂  TS 2:  𐄂 | | **Pain Point** |  | | **Improvements** |  | | |  |  | | --- | --- | | **Touchpoint** |  | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1:  𐄂  TS 2:  𐄂 | | **Pain Point** |  | | **Improvements** |  | | |  |  | | --- | --- | | **Touchpoint** |  | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1:  𐄂  TS 2:  𐄂 | | **Pain Point** |  | | **Improvements** |  | |
| |  |  | | --- | --- | | **Before Purchase / Engaging with Service** | | | **Touchpoint** |  | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1:  𐄂  TS 2:  𐄂 | | **Pain Point** |  | | **Improvements** |  | | |  |  | | --- | --- | | **During Purchase / Engaging with Service** | | | **Touchpoint** |  | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1:  𐄂  TS 2:  𐄂 | | **Pain Point** |  | | **Improvements** |  | | |  |  | | --- | --- | | **After Purchase / Engaging with Service** | | | **Touchpoint** |  | | **Review** | GQ 1: 𐄂  GQ 2: 𐄂  GQ 3: 𐄂  TS 1:  𐄂  TS 2:  𐄂 | | **Pain Point** |  | | **Improvements** |  | |