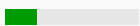


# Customer Experience Audit Checklist

Use this checklist to audit your customer experience and explore where you can be doing more.



## How are my customers first reaching me?

- ☐ Engaging with a digital or physical advertisement
- ☐ Organically finding your website
- ☐ Engaging with your social media posts
- ☐ Finding your brand based on a recommendation
- ☐ Opening a link in a cold email



### Gladly Pro Tip

The goal should be to check off as many of these boxes as possible, showing a diverse customer base can reach you across the web. Gladly equips you to handle customers across [channels](#) and support them no matter where their journey begins.

## What are my key customer touchpoints?

- ☐ Cold-contact across channels to drive sales or offer promotions
- ☐ Targeted advertising on social, digital, or SEO channels
- ☐ Point-of-sale touchpoints including selecting a product, choosing a payment method, choosing a shipping method, and final checkout
- ☐ Follow-up contact to confirm the order, saying thank you, or offering future promotions down the line
- ☐ Contact with a support representative to handle a sales issue or ask a product question
- ☐ Contact with a support representative or salesperson during the experience to up-sell or cross-sell

### Gladly Pro Tip

Gladly forgoes old-school ticketed systems for a [conversational](#) approach, ensuring all aspects of a shopper's journey are visible to your support team so they can track the customer experience and create a frictionless process.

## How am I measuring the performance of my customer experience?

- ☐ Customer Satisfaction (CSAT) scores to gauge a shopper's happiness with the experience
- ☐ Average Wait Time (AWT) and Average Handle Time (AHT) to measure typical periods of solving a customer issue
- ☐ Concurrency Rate to measure how often agents can multi-task conversations with customers simultaneously
- ☐ Customer Effort Score (CES) to gauge how little or how much extra work your customers are putting in to get to a point of sale

### Gladly Pro Tip

Gathering and implementing data on support performance is essential for improving CX. With the Gladly [Customer Insights](#) dashboard, you can accurately pinpoint channel and agent performance against your predetermined metrics to help you create an improvement plan and get your brand to the ideal place.

## What technology do I use to optimize my customer's experience?

- ☐ Self-service support to help shoppers easily solve their own issues as much as possible
- ☐ Channel **insights** into how performance is tracking across the journey for both shoppers and agents
- ☐ Single **source of truth** that allows brands to update their product, brand, and service information across multiple platforms from one resource
- ☐ Ability to complete **payments** within multiple channels, including live chat

### Gladly Pro Tip

Your agents should be equipped to consistently handle customer needs regardless of volume or channel, without compromising their ability to work at a reasonable and effective pace. Our conversation-driven system and powerful automation tools like [People Match](#) connect shoppers with the best possible agent to handle their unique issues — all in the pursuit of reducing friction in the experience as much as possible.

## About Gladly

Gladly is a customer service platform for digitally-focused B2C companies who want to maximize the lifetime value of their customers. Unlike the legacy approach to customer service software, which is designed around a ticket or case to enable workflows, Gladly enables radically personal customer service centered around people to sustain customer loyalty and drive more revenue.

The world's most innovative consumer companies like Godiva, JOANN, and TUMI use Gladly to create lasting customer relationships, not one-off experiences.

**Get started with Gladly →**