

# Customer Journey Worksheet

Customer

Service Provider(s)

Service

Supporters

	Outreach & Marketing	Beneficiary Service						Follow Up & Referrals
Touch Points								
Team Tasks								
<b>Current Customer Experience</b>								
Customer Actions								
Questions/ Barriers								
Motivations/ Needs								
Emotions								
Gaps								
<b>Future Customer Experience</b>								
Possible Improvements								

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## Notes

### Touch Points

What are the key steps in your service process?

### Team Tasks

What are your staff and volunteers doing at each step of the way? Who does the client come into contact with?

### Customer Actions

What are customers doing at each step of the way? What decisions & actions are they responsible for?

### Questions/Barriers

What uncertainties does the client face? Is there language or jargon does the client not understand? What gets in their way?

### Motivations/Needs

What will keep people moving through the process? What information, benefits, motions, values, etc. will help them move forward?

### Gaps

What's missing right now from the process for the client?  
For the team?

### Possible Improvements

What improvements can be made to the process, the structure, the information to address the gaps and barriers to an exceptional experience?

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## Key Learning

What have you learned about your service process that could make a difference in the quality of the experience for your clients and your team?