

★ EBOOK + WORKBOOK EDITION

Customer Experience Strategy Guide

Build a clear, implementable strategy that turns customer insight into lasting loyalty.













AUTHORED BY
Adetoun Akinsunmi

A STRATEGIC PLAYBOOK
8 Chapters · Workbook · Templates

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A guided journey from vision to execution — eight chapters, multiple frameworks, and printable workbook exercises.

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About the Author



Adetoun Akinsunmi

STRATEGIST · BUILDER · CUSTOMER WHISPERER

With over 17 years of experience driving customer success and experience across tech, HR, and digital platforms, Toun Akinsunmi sits at the intersection of strategy, product, and execution, translating vision into results and chaos into clarity.

“

Customer success is more than a department — it's a growth engine. This book is my no-fluff, experience-rich take on building CX strategies that actually work and scale.

— ADETOUN AKINSUNMI

How to Use This Book



Adapt to Your Context

Tailor each exercise to your size, market, and stage — startup, scale-up, or enterprise.



Work Cross-Functionally

Marketing, product, sales, and support all shape the experience. Build the strategy together.



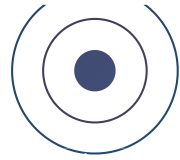
Make Incremental Progress

Implement one improvement at a time. Small wins compound into transformation.



Document Your Journey

Capture insights, exercises, and decisions as you go. The workbook becomes your playbook.



Have you ever interacted with a brand and left feeling dissatisfied and exhausted because you couldn't find what you needed, or it took too much effort to get what you wanted? Unfortunately, this experience is more common than you'd expect.

Often, companies invest heavily in customer acquisition (sales and marketing) but give little thought to how to retain those customers and keep them loyal. Most CX professionals improvise hoping they hit a customer experience jackpot. That haphazard approach confuses customers and erodes trust.



69%

SHOP MORE OFTEN WHERE
SERVICE IS CONSISTENT
(FORRESTER)



32%

WILL LEAVE A BRAND THEY
LOVE AFTER ONE BAD
EXPERIENCE (PWC)



16%

PREMIUM CHARGED BY
BRANDS THAT DELIVER
BRILLIANT CX (PWC)



Just one bad interaction, and nearly a third of your customers won't give you a second chance. That is tough, but it's also a huge opportunity for the brands that get it right.

THE CX REALITY CHECK

The Difference Strategy Makes

✗ WITHOUT A CX STRATEGY

Inconsistent service · confused customers · churn at the first hiccup · no shared vision · firefighting mode · low retention · price-sensitive buyers · weak brand trust.

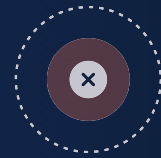
✓ WITH A CX STRATEGY

Deliberate experiences · loyal customers · pricing power · cross-functional alignment · proactive improvement · high retention · brand advocates · sustained growth.

Customer experience management is a deliberate process. You can't hope to delight customers by chance. This guide provides the frameworks, worksheets, and step-by-step methodologies to build an implementable strategy that fits your company.

A Clear and Compelling CX Vision

Define what success looks like for your customers — and rally your organization around it.



What is your Customer Experience dream? Can you articulate the purpose of your CX team? Is your vision aligned with your company's mission and values? These are the questions you must answer at the very start of your CX strategy journey.

Many companies set lofty mission and vision statements that don't even mention customers. Others have customer-related vision statements but pay lip service to actualizing them. A great CX vision unites employees, drives alignment, and turns customer experience from a department into a growth engine.

“

Highly aligned organizations grow revenue 58% faster and are 72% more profitable than those that are unaligned. A shared vision is the foundation of that alignment.

— LSA GLOBAL · 3X ORGANIZATIONAL ALIGNMENT RESEARCH

A Strong Vision should be:



Aligned

With team & customers



Inspirational

Excites & motivates



Concise

Easy to recall



Specific

Distinctly yours



Tangible

Feels achievable

Inspirational Customer-Centric Vision Statements

N

Nordstrom

"To serve our customers better, to always be relevant in their lives, and to form lifelong relationships."

Z

Zappos

"To provide the best customer service possible. Deliver 'WOW' through service."

Three Approaches to Visioning

Every organization is different. Pick the visioning process that fits your culture, leadership style, and capacity for collaboration.



Leader-Developed

Crafted by the founder or top executive. Fast, focused, and best when a leader has deep market insight.



Senior-Team

Co-created by senior leaders. Balanced perspectives, stronger credibility, and strategic alignment.



Bottom-Up

Builds from the people closest to customers. Slower but produces deep ownership and richer ideas.

APPROACH	STRENGTHS	WATCH-OUTS
Leader-Developed	Speed · clarity · clear ownership	Risk of weak buy-in if not communicated well
Senior-Team	Cross-functional alignment · credibility	Consensus-building can slow decisions
Bottom-Up	Authentic insights · strong ownership	Resource-intensive · needs strong facilitation

Workbook Exercise 1A · Vision Assessment Checklist

Score your current CX vision (or a competitor's) against each dimension. Total your score and use the tier guide.

- Inspires and motivates the team toward exceptional CX.
- Clearly describes the future you want to create for customers.
- Communicates direction that's easy to understand internally and externally.
- Stays concise and memorable (ideally under two sentences).
- Reflects your brand's unique identity and ultimate impact.
- Serves as a guidepost for all customer-facing strategies.
- Excites the team about building meaningful relationships.

Your Score: _____ / 7

6–7 · Strong

4–5 · Refine

0–3 · Reset

Articulate Your CX Dream

Before crafting a polished statement, brainstorm your biggest hopes. Don't worry about wording, capture raw, ambitious thoughts.



Emotion

How do we want customers to feel? (*empowered, relieved, delighted, trusted*)



Outcome

What's the ultimate result of interacting with us? (*simpler lives, lasting impact*)



Promise

If our experience were one promise, what would it be?



Difference

What makes our CX uniquely ours? (*speed, empathy, personalisation*)



Audience

Who is the customer at the heart of this experience?



Aspiration

If we were the gold standard, what would customers say about us?

Workbook Exercise 1B · Draft Your Vision Statement



Combine your insights into a 1–2 sentence vision

Example: "To deliver experiences that make every customer feel seen, heard, and empowered every time, across every touchpoint."



Pro Tip

Be bold. Be human. Think about *impact*, not just touchpoints. Then run your draft back through the checklist on the previous page.

Assess Your Current CX

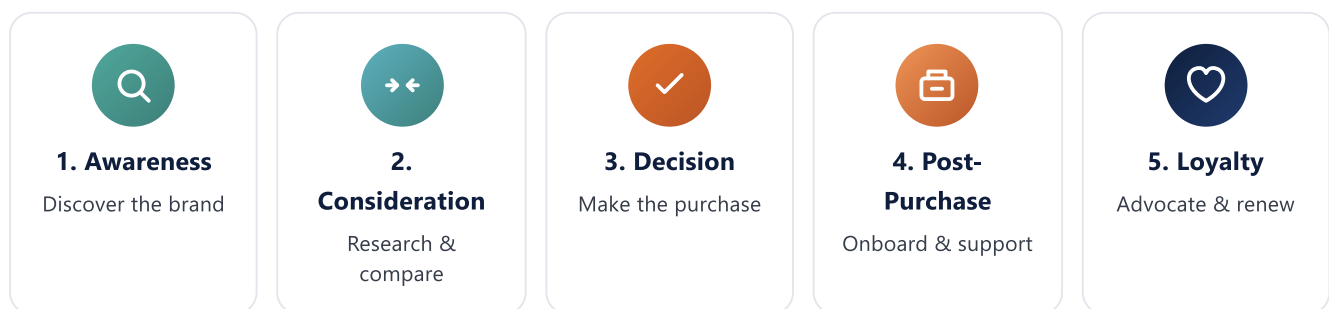
Conduct a thorough audit of every touchpoint — from first discovery to lifelong loyalty.



You've defined your CX vision or at least know the kind of experience you want to deliver. Before planning, you must assess your *current* experience. A Customer Experience Audit maps every touchpoint, uncovers pain points, and reveals what customers truly experience today.

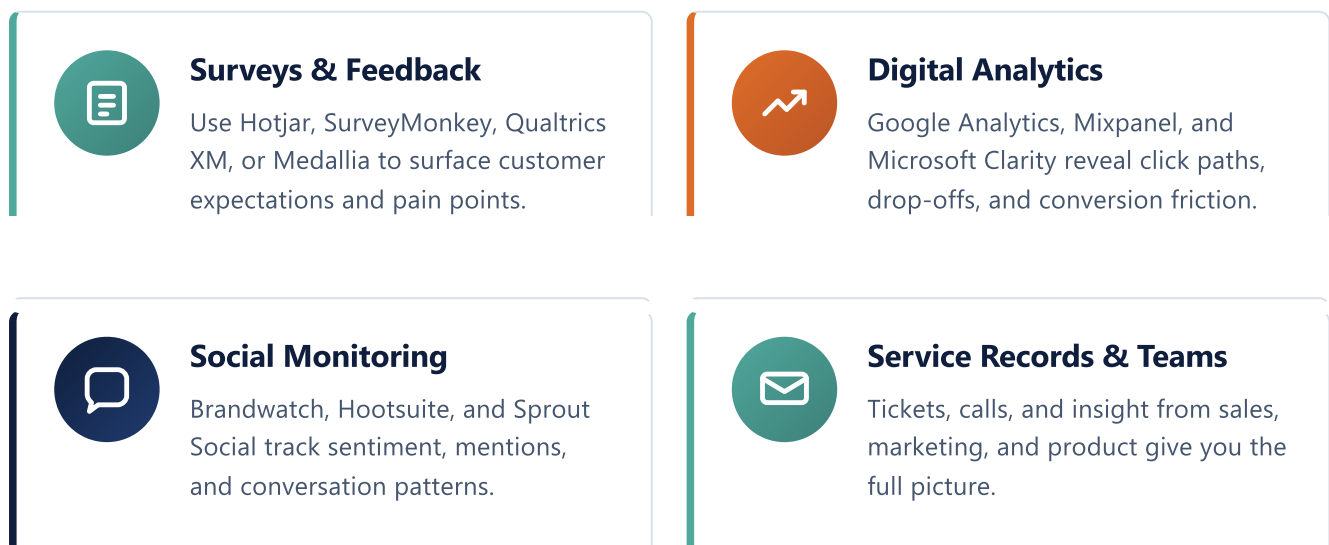
The 5 Stages of the Customer Journey

Investigate every interaction from first contact to advocacy. Each stage has its own emotions, friction, and opportunities.



Data Gathering Methods

Use multiple data sources to triangulate the truth about your customer experience.



CX Audit Guiding Questions

Use these questions at each stage of the journey to direct your investigation. Adapt them to your industry and business model.

01 Awareness

- How do people first hear about us?
- Which marketing channels are most effective?
- What pain points or needs are we addressing?

02 Consideration

- What information do prospects look for?
- What are they comparing us against?
- What resources do we offer to help them decide?

03 Decision

- What influences a customer to say yes?
- How easy is it to make a purchase?
- Are there friction points in the buying process?

04 Post-Purchase

- What happens immediately after a sale?
- How do we onboard and deliver?
- How do we support customers when issues arise?

05 Loyalty

- How do we drive repeat business?
- How do we encourage feedback?
- How do we create brand advocates?
- How do we recognize our most loyal customers?

Four Lenses for CX Analysis



Customer Actions

What is the customer doing?



Touchpoints & Feelings

Where & how they interact



Team Involvement

Which department owns it?



Opportunities

What can we innovate/improve?

Map Your Current Experience

For each stage, document what happens, who's involved, how customers feel, and where opportunity sits. Use the table below or expand into a separate workshop.

STAGE	WHAT HAPPENS?	WHO'S INVOLVED?	HOW CUSTOMER FEELS	OPPORTUNITIES / CHALLENGES
1. Awareness <i>Discovery</i>				
2. Consideration <i>Compare</i>				
3. Decision <i>Buy</i>				
4. Post-Purchase <i>Onboard</i>				
5. Loyalty <i>Advocate</i>				

Social Media Sentiment Tracker

Use this resource to capture how each platform reflects customer sentiment.

PLATFORM	POSTS / WK	AVG. ENGAGEMENT	OVERALL SENTIMENT	KEY THEME / ACTION
Facebook			● / ● / ●	
Instagram			● / ● / ●	
X (Twitter)			● / ● / ●	
LinkedIn			● / ● / ●	
TikTok			● / ● / ●	

Mapping the Customer Journey



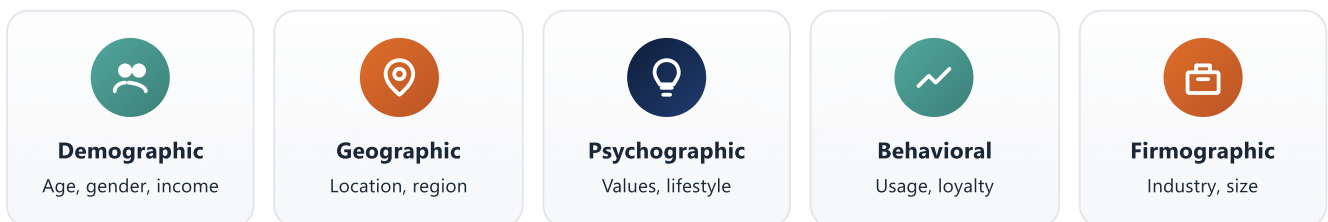
See your business through your customer's eyes — every touchpoint, emotion, and decision.

Journey mapping is one of the most powerful ways to understand and improve your customer experience. It enables you to step into your customers' shoes — seeing your business through their eyes, not yours.

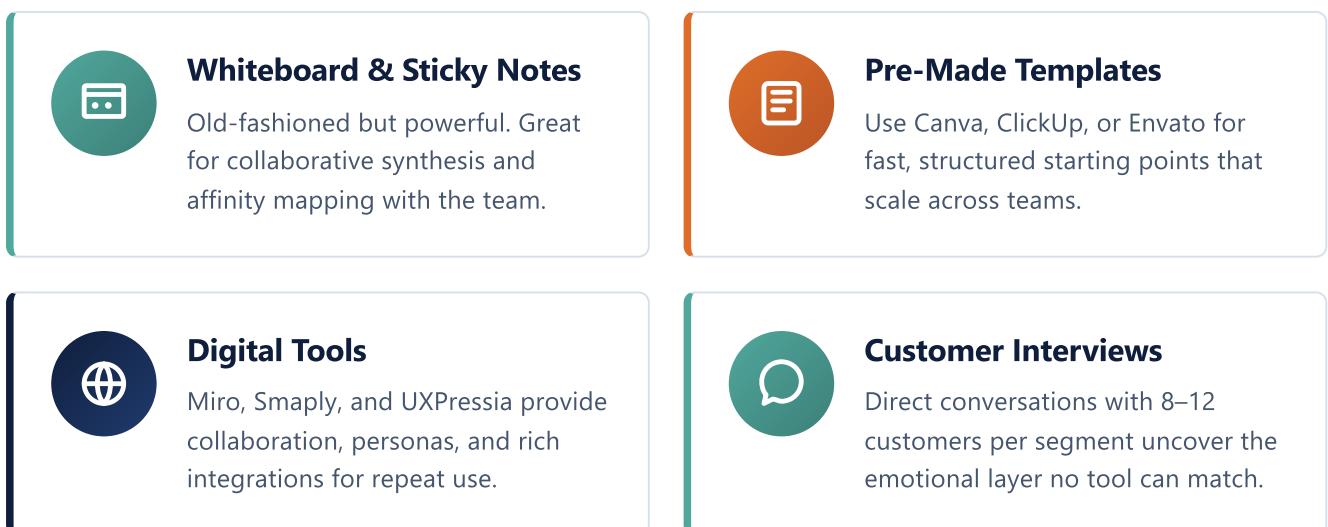
No two customers are alike, so it's essential to segment first and map their unique journeys. This process uncovers their needs, expectations, behaviors, and pain points at every stage of interaction.

Segment Your Customers First

Different segments experience different journeys. Don't average away critical nuance.



Four Mapping Methods



Sample Customer Journey Map

A complete journey map captures customer goals, actions, emotions, friction, and opportunities at every stage.

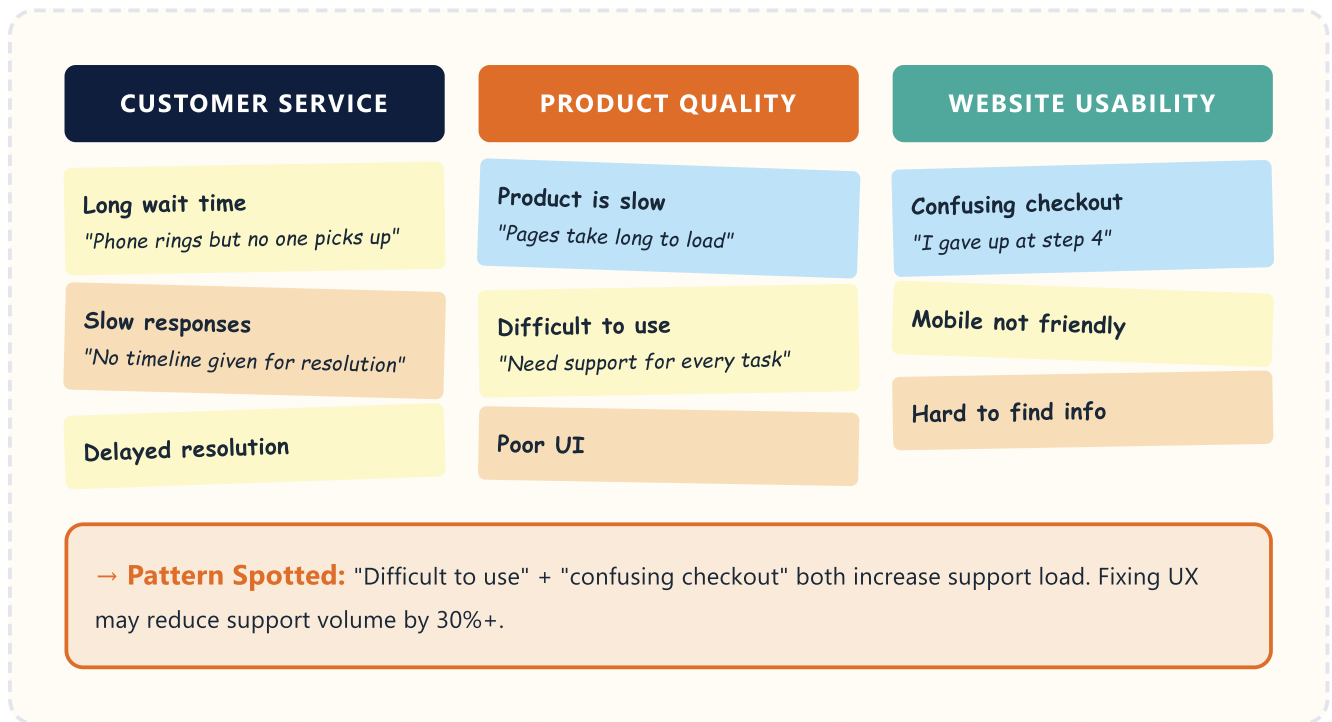


Detailed Journey Map Template

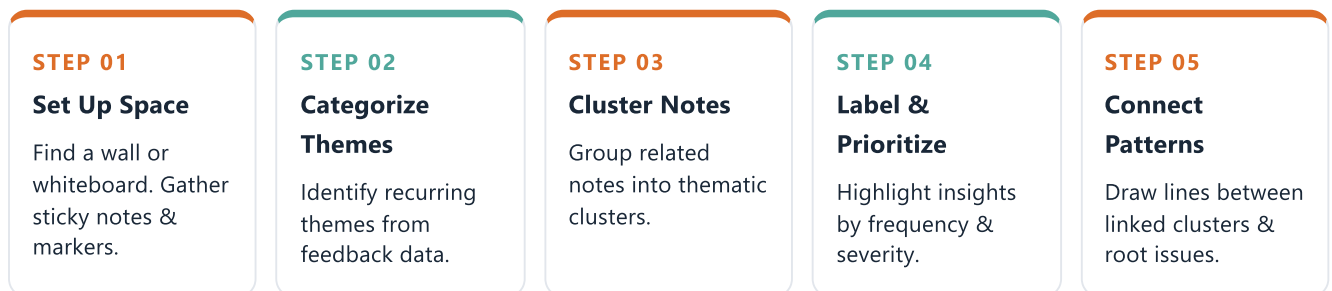
STAGE	CUSTOMER GOAL	ACTIONS	EMOTION	FRICITION	OPPORTUNITY
Awareness	Understand whether your brand is relevant.	Searches, asks peers, sees content.	Curious	Vague messaging, weak proof.	Clarify promise & value story.
Consideration	Compare options with confidence.	Reads case studies, books demo.	Cautious	Inconsistent info across channels.	Build clear decision-support flow.
Decision	Buy with low risk and effort.	Signs contract, talks to sales.	Hopeful	Complex approvals, objections.	Simplify purchase & reassure.
Post-Purchase	Get up and running quickly.	Onboarding, support, training.	Relieved	Slow onboarding, unclear steps.	Design first-90-day journey.
Loyalty	Stay, expand, advocate.	Renews, refers, shares feedback.	Delighted	Reactive engagement, no recognition.	Create advocacy & expansion.

Whiteboard Affinity Diagram

A favorite technique: cluster individual customer comments into themes, then link patterns across themes to reveal root causes.

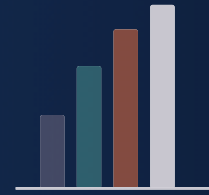


Five Steps to Build an Affinity Diagram



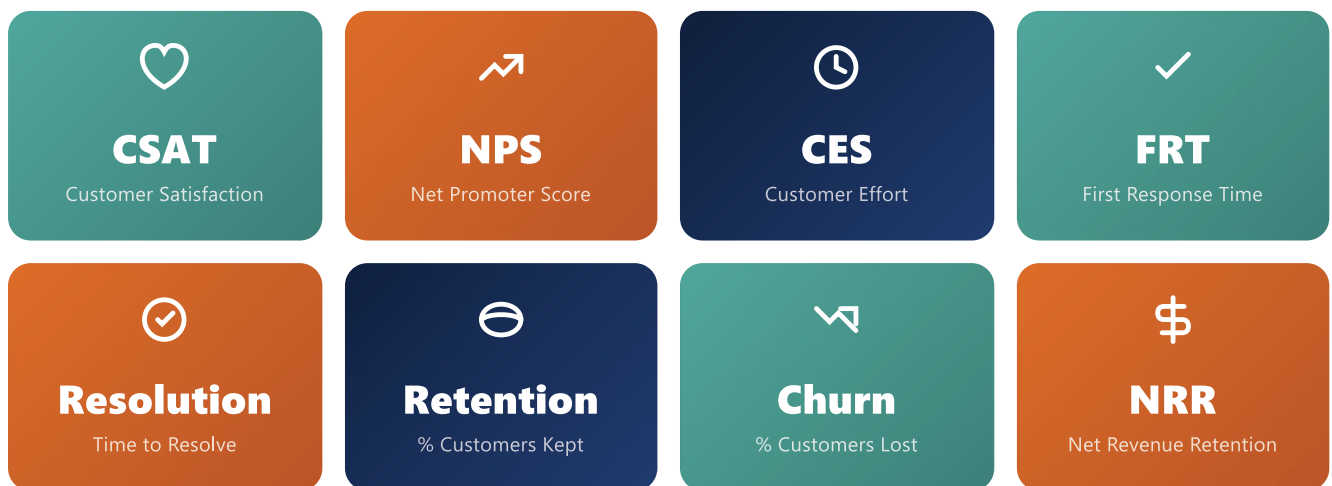
Benchmark CX Practices

Compare your performance against industry standards to set realistic, ambitious targets.

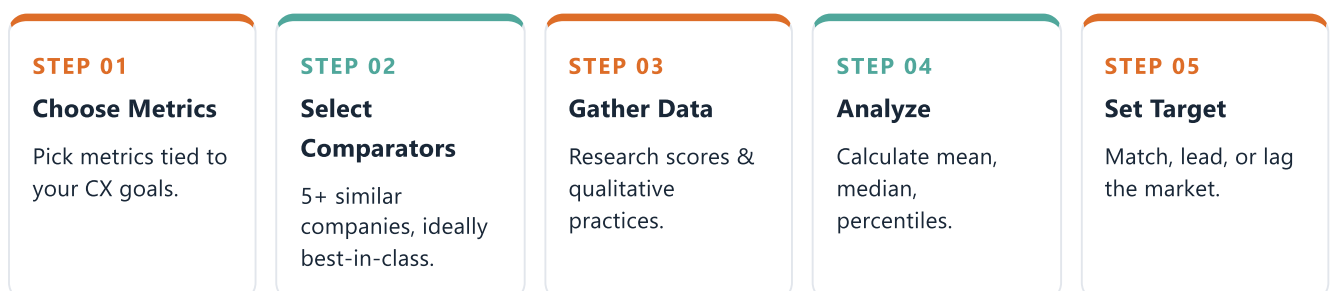


Benchmarking turns aspiration into a measurable target. Select the customer and operating metrics that matter, choose comparable organizations, and identify where "good" looks like in your market.

Core CX Metrics to Track

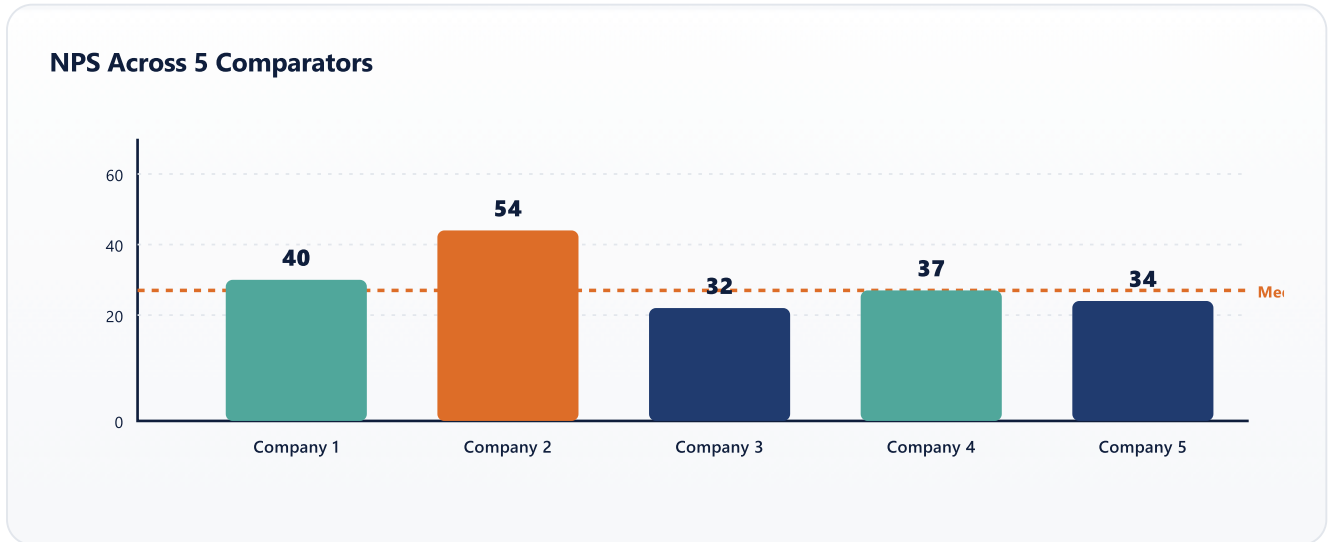


Benchmarking Process



NPS Benchmark in Action

Here's how a benchmarking exercise looks for the Net Promoter Score across five comparator companies.



Percentile Analysis



Qualitative Practice Scan

COMPARATOR	NPS	OBSERVED BEST PRACTICE
Company 1	40	24/7 omnichannel support; live chat, email, phone always available.
Company 2 ★	54	Loyalty rewards, exclusive deals, early access to new products.
Company 3	32	AI-powered proactive outreach to customers showing risk signals.
Company 4	37	Hyper-personalized responses using customer history and preferences.
Company 5	34	Seamless omnichannel — start chat, finish via email, no context lost.

Conduct Gap Analysis

Compare your current CX with your desired outcomes — and uncover the root causes behind every gap.



With your audit and benchmark results in hand, you can now compare current state to desired state. Gap analysis reveals where you're falling short and grouping gaps strategically reveals systemic issues you can solve at once.

Gap Categories

Group gaps strategically. Patterns across categories often reveal interconnected problems.



Core vs. Secondary Gaps

Always address core gaps first — the ones that interrupt your basic promise. Secondary gaps matter, but only after the basics work.

⚠ CORE GAP (FIX FIRST)

Example: A food delivery company doesn't meet promised delivery times and frequently mixes up orders. Food arrives cold and incorrect, eroding the brand's most basic promise.

○ SECONDARY GAP (FIX LATER)

Example: The same company doesn't track customer order history to recommend personalized deals. A nice-to-have, but pointless if delivery is broken.



The Rule

Resources are finite. Pick gaps with the highest impact on customer satisfaction *and* business outcomes. Fix the foundation before you decorate the building.

The 5 Whys Method

Drill down five layers deep to move from symptom to true root cause. Most teams stop at the symptom and keep solving the wrong problem.

Worked Example

Problem: Our NPS is -14 — at the 0th percentile of our market.

1**Why is our NPS so low?**

Customers complain about long resolution times — leading to frustration and high effort.

**2****Why are resolution times so long?**

There aren't enough support agents to handle the call volume.

**3****Why aren't there enough agents?**

We haven't hired enough to meet increased call volume.

**4****Why haven't we hired enough?**

There was no forecast for increased call volume.

**5****Why was there no forecast?**

Sales never communicated the projected increase in customers to support.

“

Root Cause: Lack of structured communication between Sales and Support about projected customer growth.

NOW SOLVABLE!

Your 5 Whys Worksheet

Pick a critical CX gap. Drill down through five "whys" until you reach a root cause you can actually act on.

PROBLEM STATEMENT

1

Why? →

2

Why? →

3

Why? →

4

Why? →

5

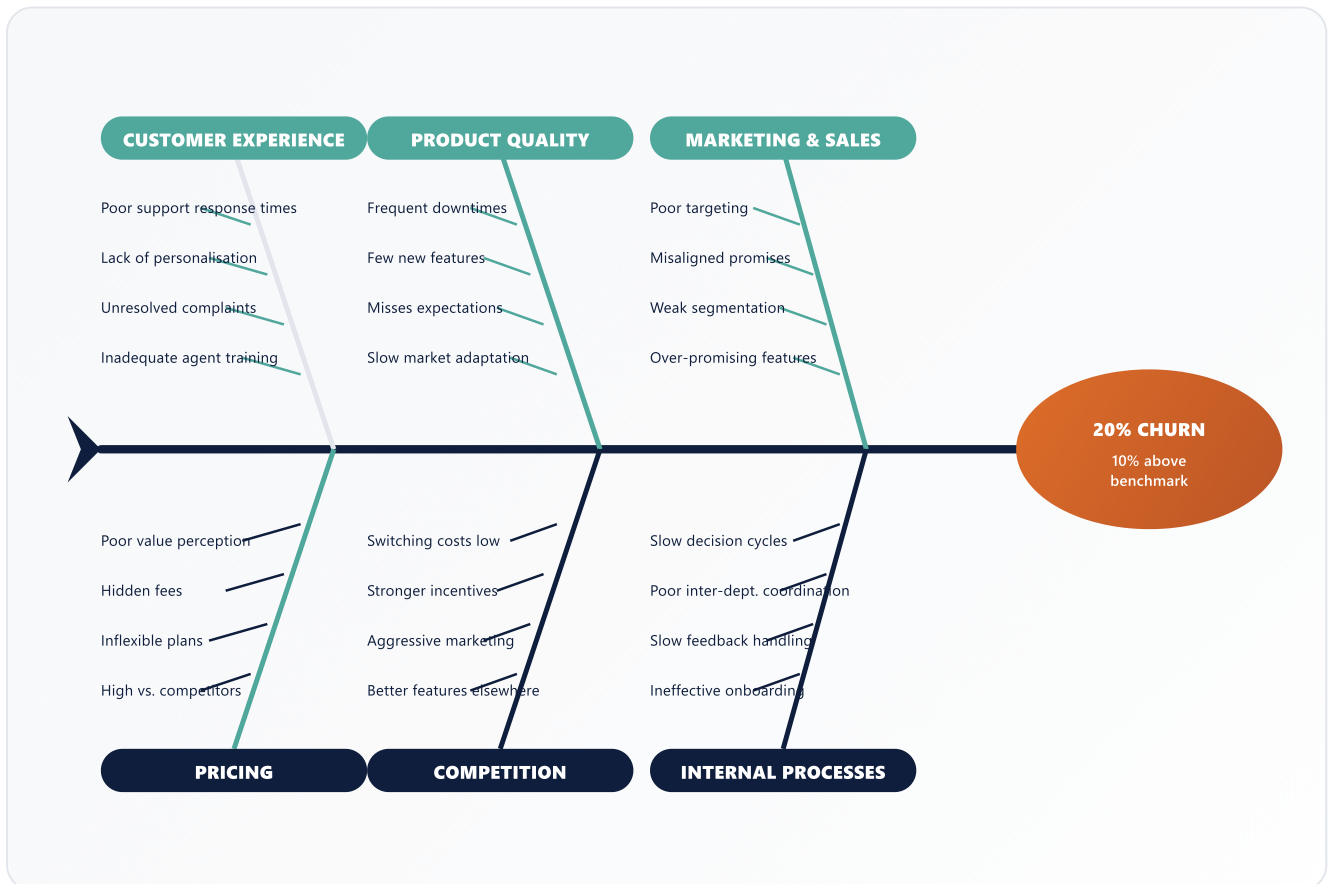
Why? →

★ ROOT CAUSE

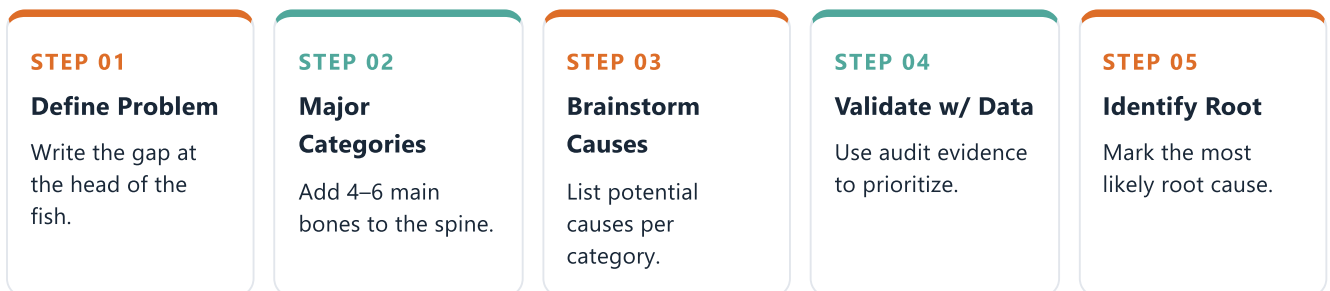
The Fishbone (Ishikawa) Diagram

Organize potential causes into major categories to systematically investigate why a CX problem exists. Below is the same problem analyzed using all six common CX cause categories.

Problem: 20% churn rate — 10% higher than industry benchmark.

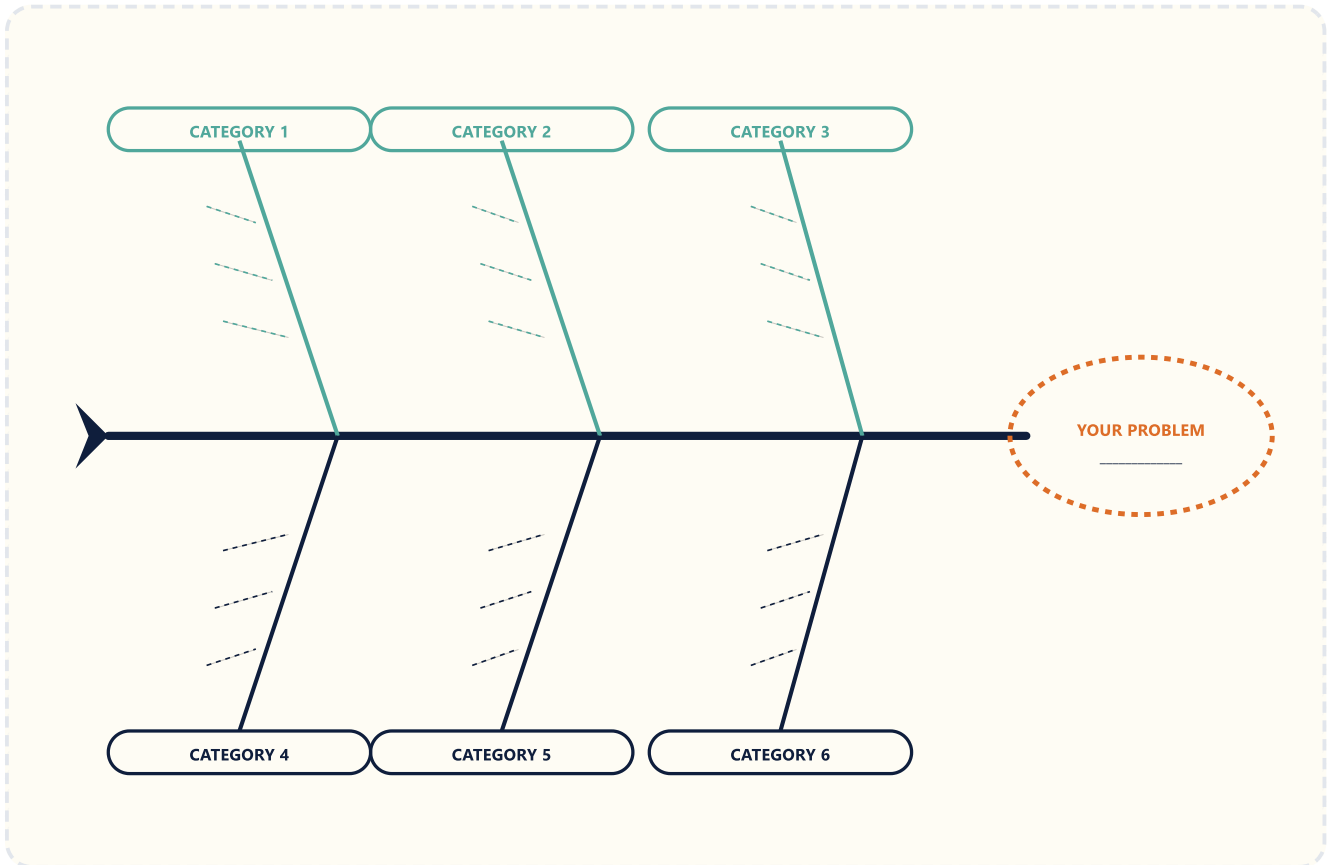


How to Use the Fishbone



Your Fishbone Diagram

Use this blank template to diagnose your own CX problem. Fill in the head and add causes under each major category.



Most Likely Root Cause(s)

Evidence Supporting It

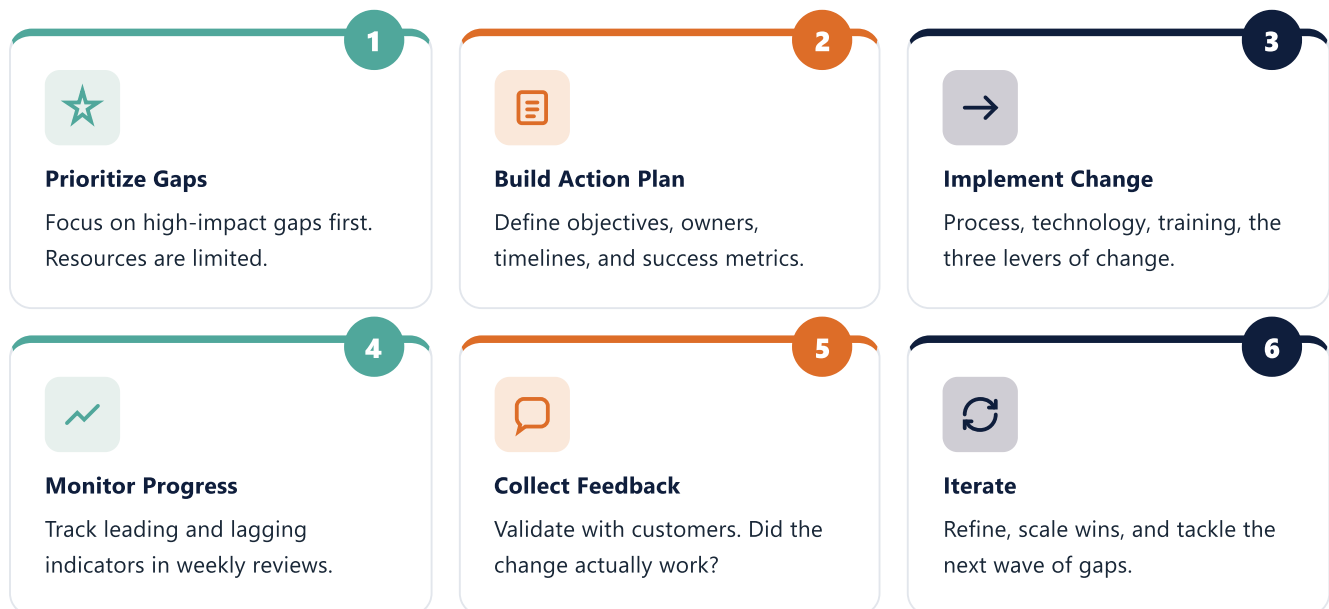
Address CX Gaps

Turn diagnosis into action. Build a structured plan with clear owners, timelines, and success metrics.



You've uncovered the gaps and identified their root causes. Now comes the hardest part: **execution**. Closing CX gaps requires structured prioritization, clear ownership, and an iterative mindset.

Six-Step Implementation Approach



The Continuous Improvement Loop



Sample Action Plan: Poor Response Times

Here's how a complete action plan looks for a single prioritized gap. Use this format as a model for your own plans.

OBJECTIVE	INITIATIVE	OWNER	TIMELINE	RESOURCES	SUCCESS METRIC
Reduce first response time by 40%	Implement queue triage system; build tier-1 knowledge base.	Head of Support	60 days	\$25K tooling + 2 new hires	Median FRT under 1 hrs
Improve self-service rate by 25%	Launch help center, FAQ chatbot, and video walkthroughs of top 10 issues.	CX Operations Lead	90 days	\$15K platform + content team	Self-service deflection 25%+
Increase agent capability to deliver	Deliver soft-skills training, product certification, and resolution playbooks.	Training Manager	45 days	\$10K training program	Agent CSAT score 4.5+/5

Your Action Plan Matrix

Use this template to plan your next 3–5 prioritized gaps.

INITIATIVE	OWNER	TIMELINE	RESOURCES	SUCCESS METRIC	PRIORITY
					● / ● / ●
					● / ● / ●
					● / ● / ●
					● / ● / ●

90-Day Roadmap Visualization



Align CX with Business Goals

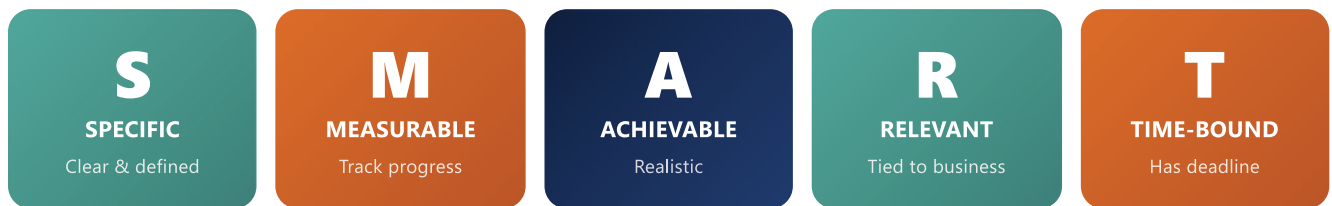
Make CX strategic. Connect every initiative to growth, retention, efficiency, and brand outcomes.



Customer experience becomes durable when it's tied to business outcomes. Translate your vision into SMART objectives and show leaders exactly how CX influences growth, retention, efficiency, and brand trust.

Align SMART CX Objectives with Business Objectives

Strong objectives are Specific, Measurable, Achievable, Relevant, and Time-bound.



SMART Example

"Increase onboarding completion from 62% to 82% within two quarters by redesigning the welcome journey, improving training content, and assigning Customer Success ownership."

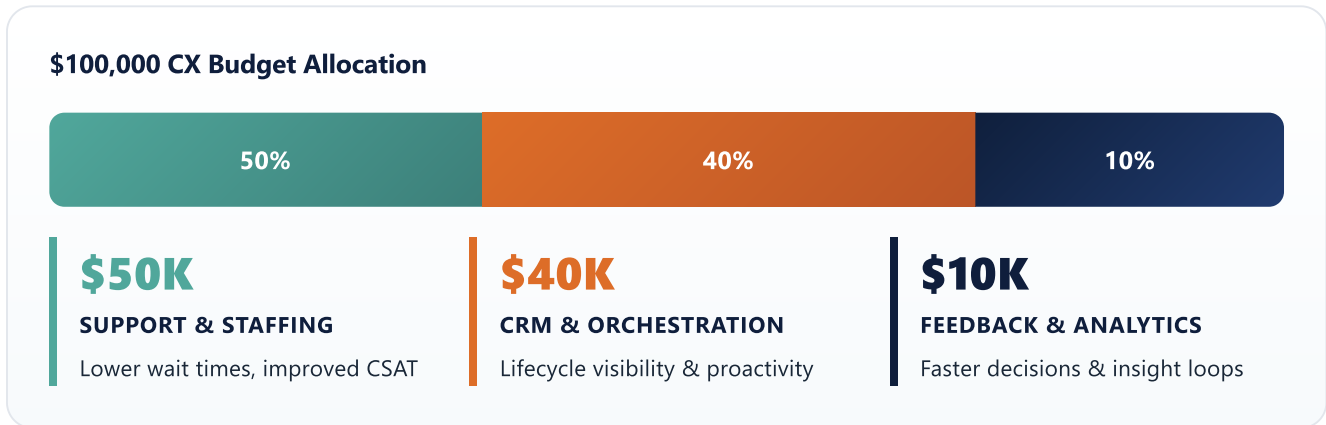
Cross-Functional Alignment Model

Customer experience is an enterprise sport. Every team owns a piece of the journey.







Illustrative CX Investment Model

A balanced CX program invests across people, technology, and feedback infrastructure. Here's what a \$100,000 program can unlock.



Business Outcomes Connected to CX

 <p>Revenue Growth Excellent CX commands premium pricing & reduces sales friction.</p>	 <p>Retention & LTV Loyal customers stay longer, expand more, and refer freely.</p>
 <p>Operating Efficiency Better self-service & fewer escalations reduce cost-to-serve.</p>	 <p>Brand Trust Consistent CX builds the reputation no marketing budget can buy.</p>

Business Alignment Canvas

Connect customer experience priorities to business outcomes, capabilities, and measurable success.

Workbook · Business Alignment Canvas

BUSINESS GOAL _____ _____ _____ _____ _____	CUSTOMER OUTCOME REQUIRED _____ _____ _____ _____ _____
CAPABILITIES NEEDED _____ _____ _____	SUCCESS METRIC _____ _____ _____

Customer-Centric Culture

Strategy only lives when culture supports it. Build the mindset, behaviors, and rhythms that sustain CX.



The best CX strategies fail when culture doesn't reinforce them. Teams need clarity, capability, recognition, and visible leadership behaviors that make customer-centric choices feel normal, even expected.

Four Pillars of a Customer-Centric Culture



Communicate the Change

Explain what's changing, why it matters, what success looks like, and how each function contributes.



Build Ownership

Move from "the CX team owns this" to "every team shapes the experience." Make roles and behaviors explicit.



Train & Enable

Equip employees with skills, scripts, product knowledge, and decision rights to improve moments that matter.



Celebrate Progress

Recognize teams that improve customer effort, close feedback loops, and model the desired behaviors.

Change Management Journey

Culture change follows a predictable arc. Plan for each stage to avoid stalls.



Culture Readiness Scorecard

Use this exercise to assess where your culture is today before committing to specific team behaviors.

Culture Readiness Scorecard

Rate your organization 1–5 on each dimension. Total your score to see your readiness band.

DIMENSION	WHAT "5" LOOKS LIKE	SCORE (1-5)
Leadership Commitment	CX is a standing agenda item; leaders model behaviors visibly.	<input type="text"/>
Role Clarity	Every team knows its CX role and how it connects to customer outcomes.	<input type="text"/>
Data Visibility	Customer feedback, NPS, CSAT are visible to everyone in real time.	<input type="text"/>
Frontline Capability	Teams are trained, empowered, and trusted to make customer decisions.	<input type="text"/>
Recognition	Customer-centric behaviors are celebrated publicly and rewarded.	<input type="text"/>
TOTAL SCORE		___ / 25

20–25 · Strong

12–19 · Build

0–11 · Reset

Team Commitment Charter

Capture the behaviors your team will start, stop, and continue to build a stronger customer-centric culture.

Team Commitment Charter — Start / Stop / Continue

Define the specific behaviors you'll change to make CX more consistent and more human.

+ START	□ STOP	✓ CONTINUE

CONCLUSION

CX is a Discipline, Not a Destination

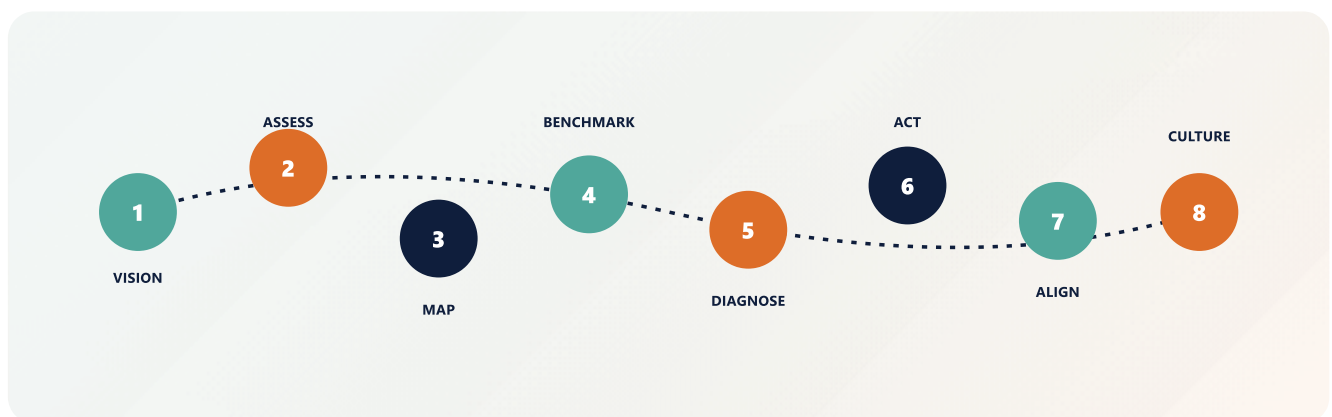


The strongest teams don't chase perfection — they build a steady rhythm of listening, learning, and improving.

Customer experience is not a one-time initiative. It is a management discipline, a continuous loop of vision, diagnosis, prioritization, execution, and cultural reinforcement. Markets shift. Customer expectations rise. Competitors evolve. Your CX strategy must too.

Use this guide as a companion. Return to the worksheets each quarter. Update your vision when your strategy shifts. Re-audit when growth changes the journey. Re-benchmark as the market matures. Build a CX rhythm that compounds improvements, year after year.

Your CX Journey at a Glance



A great customer experience strategy isn't measured by the elegance of your slides — it's measured by the loyalty of the customers you keep, and the advocates they become.

★ FINAL THOUGHT

Final Reflection & Your Next-Steps Checklist

Use this page to reflect on the experience you want customers to remember and confirm the next actions that move the strategy forward.

Final Reflection



What is the single most important experience you want your customers to remember six months from now — and what must change internally to make that promise real?

Your Next-Steps Checklist

- | | |
|---|--|
| <input type="checkbox"/> Vision set — drafted & aligned | <input type="checkbox"/> CX audit complete — touchpoints mapped |
| <input type="checkbox"/> Journey mapped — by segment | <input type="checkbox"/> Benchmarked — targets set |
| <input type="checkbox"/> Gaps prioritized — root cause known | <input type="checkbox"/> Action plan launched — owners assigned |
| <input type="checkbox"/> Business alignment — SMART goals | <input type="checkbox"/> Culture activated — charter signed |

Printable Worksheets

Your toolkit. Print, fill, share, repeat. Use these any time you need to refresh your CX strategy.



Use this index to find the right worksheet for the job. All exercises are designed to be filled by hand or digitally, individually or as a team.

WORKSHEET	PURPOSE	USE WHEN	PAGE
★ CX Vision Statement	Define and refine your CX Vision	After leadership alignment	07
★ CX Audit by Stage	Document each stage of the journey	Annually or post-rebrand	10
★ Journey Map Template	Visualize stages, emotions, friction	Service design workshops	12
★ Benchmark Planner	Set realistic market targets	Before KPI commitments	15
★ 5 Whys Analysis	Drill down to a root cause	For any prioritized gap	18
★ Fishbone Diagram	Map causes across 6 categories	For complex multi-cause gaps	20
★ Action Plan Matrix	Connect initiatives to owners	When planning execution	22
★ Business Alignment Canvas	Tie CX to business outcomes	Before budget planning	24
★ Culture Readiness Scorecard	Assess organizational readiness	Before culture initiatives	26
★ Start / Stop / Continue Charter	Commit to specific behaviors	Quarterly team reviews	26

Recommended CX Tools



Survey & Feedback

Hotjar · SurveyMonkey · Qualtrics · Medallia



Analytics

Google Analytics · Mixpanel · Microsoft Clarity



Social Listening

Brandwatch · Hootsuite · Sprout Social · Mention



Journey Mapping

Miro · Smaply · UXPressia · Canva · ClickUp

CX Glossary

Key Terms

CSAT

Customer Satisfaction Score — average rating after an interaction.

NPS

Net Promoter Score — % of promoters minus % of detractors (-100 to +100).

CES

Customer Effort Score — measures how easy it was to get something done.

FRT

First Response Time — how long until a customer first hears back.

Churn

% of customers who stop doing business with you in a given period.

NRR

Net Revenue Retention — revenue retained from existing customers including expansion.

Touchpoint

Any moment a customer interacts with your brand — digital or human.

Persona

A research-based representation of a customer segment with goals & behaviors.

Workshop Notes

Use this page to capture insights, decisions, and action owners from your CX planning session.

Workshop Notes

INSIGHTS CAPTURED

DECISIONS MADE

ACTIONS & OWNERS



Now Go Build Loyalty Champions.

Strategy without execution is wishful thinking. You have the frameworks, the worksheets, and the rhythm. The next move is yours.

8

CHAPTERS

10+

WORKSHEETS

∞

ITERATIONS

A STRATEGIC PLAYBOOK BY

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