FREE RESOURCE

CX Self-Audit Checklist

Seven areas to examine in your client experience this week.

Shirley L.A. Brooks | clientexperiencearchitect.com

Use this checklist to do a quick, honest audit of your client experience before you invest in anything else. For each area, mark where you stand: **Strong**, **Needs Work**, or **Not in Place**. The pattern you see across all seven areas will tell you where to focus first.

01 Your Digital Front Door

Can a prospect find you, understand what you offer, and take the next step without hitting a dead end? Check your website, contact links, booking process, and first impression. If anything is broken, unclear, or missing, it is costing you clients before a conversation ever starts.

Shirley's note: *Ask someone who does not know your business to navigate your site and tell you where they got confused.*

✓ STRONG	■ NEEDS WORK	✗ NOT IN PLACE

02 Your Onboarding Process

Can you describe what happens in the first 48 hours after a client says yes, without looking anything up? If it lives in your head and varies by client, it is not a process. It is a habit. Write down the five things that should happen every single time.

Shirley's note: *If you cannot explain your onboarding in under two minutes, your client cannot follow it.*

✓ STRONG	■ NEEDS WORK	✗ NOT IN PLACE

03 Your Policies (Refunds, Cancellations, Scope)

Are your refund policy, cancellation terms, and out-of-scope process written down and shared with every client before the work begins? Unwritten policies create conflicts. Written policies prevent them. If a client has ever surprised you with a request you did not know how to handle, this is the area to address.

Shirley's note: *Scope creep that goes unaddressed does not just cost you revenue. It costs you your energy and your enthusiasm for the work.*

✓ STRONG	■ NEEDS WORK	✗ NOT IN PLACE

04 Your Communication Standards

Do your clients know how to reach you, how quickly you respond, and what to expect between sessions or deliverables? Silence reads as indifference. Define your response time, your preferred channel, and your check-in rhythm, and share it at the start of every engagement.

> ***Shirley's note:*** *Clients who have to chase you do not stay clients.*

✓ STRONG	■ NEEDS WORK	✗ NOT IN PLACE

05 Your Satisfaction Checkpoints

Do you have any formal way to know whether a client is satisfied, neutral, or at risk before they tell you, or before they leave? A 30-day and 60-day check-in, even a simple two-question email, gives you data you can act on instead of surprises you cannot.

> ***Shirley's note:*** *Most clients do not complain. They just do not renew.*

✓ STRONG	■ NEEDS WORK	✗ NOT IN PLACE

06 Your Service Recovery Process

When something goes wrong, what do you do? If the answer is "I figure it out in the moment," your nervous system is making decisions under pressure that should already be decided. Know in advance: how you communicate when something slips, what you say in the first 24 hours, and how you lead with a solution rather than an explanation.

> ***Shirley's note:*** *How you handle a problem tells a client more about you than how you handle everything going right.*

✓ STRONG	■ NEEDS WORK	✗ NOT IN PLACE

07 Your Referral and Offboarding Process

When a client engagement ends well, do you have a structured way to capture the result and ask for a referral? Most founders leave this to chance. A simple offboarding process that documents outcomes, invites feedback, and creates a natural opening for referrals turns the end of one engagement into the beginning of the next.

> ***Shirley's note:*** *The best time to ask for a referral is while the result is still fresh and the client still feels the value.*

✓ STRONG	■ NEEDS WORK	✗ NOT IN PLACE

If two or more areas came up as Needs Work or Not in Place, the CX Diagnostic is your next step. One session, a clear gap analysis, and a priority roadmap so you know exactly what to build first. Book at clientexperiencearchitect.com or email shirley@yswsgrowth.com