



Customer Touchpoints Assessment

See your business through
the eyes of your customers



Dare to be the exception™ | [MarcHaine.com](https://www.MarcHaine.com)



The toughest thing an owner or manager can do is objectively look at their business. Not until one views their business or property through the eyes of a visitor can one truly see where they need to improve.

The following touchpoint assessments are meant to help you view each component of your business with a laser focus.

I encourage you to not only do the assessment yourself but encourage some of your team members to take on the role of a visiting client and fill out the assessment through their eyes. For even a more impactful observation, recruit someone who has never been to your business to do the assessment as a fist-time visitor. Reaching out to a local University business program might yield some willing eyes.

Having done copious amounts of secret shopper visits, I know operators tend to get defensive on some of the observations. But note, the comments people make are just their observations - whether you find a situation or condition tolerable or not, is entirely up to you. (See my best practice story on my website www.MarcHaine.com).

Feel free to mix and match the following Customer Touchpoint Assessments to your needs.

Customer Touchpoint Assessment: **Professional Services** - 3 -

Customer Touchpoint Assessment: **Food Service**..... - 8 -

Customer Touchpoint Assessment: **Retail** 13

Break a leg,

Marc Haine

Customer Touchpoint Assessment: Professional Services

The property touchpoint assessment is intended to be used by business owners and managers to assess the various areas of their business that a customer comes into contact with, with a critical eye towards improvement.

Keep in mind, that this worksheet can only serve as a guideline – some points might not be relevant to you and your business – in which case, strike a line through the section or individual points that don't apply to you, and don't include them in your calculations.

Off-Property Impression	5	4	3	2	1	What needs to be done to make it better?
<ul style="list-style-type: none"> Website is up to date with address and contact information easily viewable 						
<ul style="list-style-type: none"> Social media presence consistent with target market, brand, relevant, and responsive 						
<ul style="list-style-type: none"> Review sites (yelp, trip advisor, google, etc.) reflect brand in positive light 						
<ul style="list-style-type: none"> Business listed on www.google.com/business - profile complete 						
Section Total			Out of	20		
Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Signage						
<ul style="list-style-type: none"> On the approach to my business, my external branding is obvious and consistent with all my corporate branding? 						
<ul style="list-style-type: none"> It can be seen clearly at a good distance to attract and direct new customers? 						
<ul style="list-style-type: none"> Signage is intact (no partially lit signs, burnt-out bulbs, etc)? 						
Section Total			Out of	15		
Parking Lot						
<ul style="list-style-type: none"> Was the parking assessable, clean and well lit? 						
<ul style="list-style-type: none"> Handicap spots well labeled, appropriately placed? 						
<ul style="list-style-type: none"> Priority parking for seniors? 						
<ul style="list-style-type: none"> Directional signage visible, well lit, in good repair? 						
<ul style="list-style-type: none"> Pathways clean and clear 						
<ul style="list-style-type: none"> Exit signs clearly marked 						
<ul style="list-style-type: none"> Traffic flow and egress out of parking lot is painless 						
Section Total			Out of	35		

Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Entrance to Building						
• Exterior decorations seasonally appropriate						
• Entrance is free of smokers						
• No employees are visible smoking outside						
• Entrance looks inviting and welcoming						
• Doors and windows clean						
• Doors and windows in good repair						
• Windows clean, window signs appropriate (relevant to the business)						
• Entrance well lit						
• No tripping hazard in threshold						
• Door powered for handicap access						
• Entrance mats clean and straight						
• Entrance mats don't form tripping hazard						
Section Total			Out of	60		
Service Egress						
• Where the customer needs to go is clear						
• Reception area is well lit and uncluttered						
• Area decorated to reflect brand						
For business not located on the main floor						
• Stairs in good repair						
• Internal directional signage visible and clear						
• Elevator / escalator in good repair						
• Hallways are clear and unobstructed						
• Signage for businesses easily identified						
• Entry mats are clean and well maintained						
Section Total			Out of	45		
Reception / Waiting Area						
• Waiting room clean and well presented						
• Chairs clean and in good repair						
• Coffee tables and display tables neat and clean						
• Coffee, tea and water service easily accessible						
• Magazines current and in good repair						
• Signage relevant, timely and in good repair						
• Temperature of space comfortable for customers (not too warm in the winter, for clients wearing coats)						
Section Total			Out of	45		



Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Customer Amenities: Washrooms						
<ul style="list-style-type: none"> Signs to restrooms easy to spot 						
<ul style="list-style-type: none"> Restrooms clean and odour free – Mirrors, toilet, wash basin clean and free of water stains. 						
<ul style="list-style-type: none"> Restrooms stocked with necessary toiletries 						
<ul style="list-style-type: none"> Floors are clean and free of spills and debris 						
Section Total			Out of	20		
Customer Amenities: Customer Service / Returns						
<ul style="list-style-type: none"> Customer service and returns desk clearly signed 						
<ul style="list-style-type: none"> Desks are uncluttered, with clear indicators where customers can be served 						
<ul style="list-style-type: none"> Area has ample room for patrons, carts, packages, etc. 						
Section Total			Out of	15		
Checkout Touchpoints						
<ul style="list-style-type: none"> Approach to cash clear and easy to navigate 						
<ul style="list-style-type: none"> Impulse racks fully stocked, easy to reach and well labelled 						
<ul style="list-style-type: none"> Cash area is uncluttered, and clean, including belts, bagging area 						
<ul style="list-style-type: none"> Signage is clean, visible, relevant and in good repair 						
<ul style="list-style-type: none"> No internal (company) memos, staff communiques, etc. are visible to the customer 						
<ul style="list-style-type: none"> Self-Checkout screens and surfaces are clean and unobstructed 						
Section Total			Out of	30		



Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Departure Touchpoints						
• Path to exit doors are well marked						
• Path to exit doors is unobstructed						
• Exit is easy for patron leaving empty handed						
• Egress out of the store easy for patrons with packages						
• Promotional signage on exit, relevant, clean and visible						
• Exit Doors in working condition						
• Exit doors and windows clean						
Section Total			Out of	35		
Total of all sections			Out of			



The goal for the next 30 days	
TO START	
TO STOP	
TO CHANGE	

Customer Touchpoint Assessment: Food Service

The property touchpoint assessment is intended to be used by business owners and managers to assess the various areas of their business that a customer comes into contact with, with a critical eye towards improvement.

Keep in mind, that this worksheet can only serve as a guideline – some points might not be relevant to you and your business – in which case, strike a line through the section or individual points that don’t apply to you, and don’t include them in your calculations.

Off-Property Impression	5	4	3	2	1	What needs to be done to make it better?
<ul style="list-style-type: none"> Website is up to date with address and contact information easily viewable 						
<ul style="list-style-type: none"> Social media presence consistent with target market, brand, relevant, and responsive 						
<ul style="list-style-type: none"> Review sites (yelp, trip advisor, google, etc.) reflect brand in positive light 						
<ul style="list-style-type: none"> Business listed on www.google.com/business - profile complete 						
Section Total			Out of	20		
Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Signage						
<ul style="list-style-type: none"> On the approach to my business, my external branding is obvious and consistent with all my corporate branding? 						
<ul style="list-style-type: none"> It can be seen clearly at a good distance to attract and direct new customers? 						
<ul style="list-style-type: none"> Signage is intact (no partially lit signs, burnt-out bulbs, etc)? 						
Section Total			Out of	15		
Parking Lot						
<ul style="list-style-type: none"> Was the parking assessable, clean and well lit? 						
<ul style="list-style-type: none"> Handicap spots well labeled, appropriately placed? 						
<ul style="list-style-type: none"> Priority parking for seniors? 						
<ul style="list-style-type: none"> Directional signage visible, well lit, in good repair? 						
<ul style="list-style-type: none"> Pathways clean and clear 						
<ul style="list-style-type: none"> Exit signs clearly marked 						
<ul style="list-style-type: none"> Traffic flow and egress out of parking lot is painless 						
Section Total			Out of	35		



Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Entrance to Building						
• Exterior decorations seasonally appropriate						
• Entrance is free of smokers						
• No employees are visible smoking outside						
• Entrance looks inviting and welcoming						
• Doors and windows clean						
• Doors and windows in good repair						
• Windows clean, window signs appropriate (relevant to the business)						
• Entrance well lit						
• No tripping hazard in threshold						
• Door powered for handicap access						
• Entrance mats clean and straight						
• Entrance mats don't form tripping hazard						
Section Total			Out of	60		
Service Egress						
• The entrance into store is clear						
• Entrance area is well lit and uncluttered						
• Customers know where they need to go and what they need to do						
• Entry mats are clean and well maintained						
For business not located on the main floor						
• Stairs in good repair						
• Internal directional signage visible and clear						
• Elevator / escalator in good repair						
• Hallways are clear and unobstructed						
• Signage for business easily identified						
Section Total			Out of	45		

Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Restaurant Guest Touchpoints						
• Hostess stand clean and organized						
• Signage professionally produced – no unprofessional handwritten signage						
• Floor and mats are clean and free of debris						
• Ceiling fans, A/C vents, curtains, blinds are clean and in good repair						
• Temperature comfortable						
• No overwhelming odours present						
• Dining room tables have been all bussed and set						
• Tables are clean, not sticky						
• Tables are in good repair and don't wobble						
• Chairs and benches are clean and in good repair						
• Place settings are consistent on every table						
• Spacing between tables is comfortable, allowing movement without bumping						
• Table toppers clean and relevant, condiments clean and refreshed (no partial bottles or jars)						
• Menus are clean, well printed and professional looking						
• Cutlery, napkins, glassware are clean, with no water spots or stains						
• Ambient sounds at a good level (Music, TVs, etc)						
• Ambient sounds support brand, look and feel of the property						
• Site lines to entertainment unencumbered						
• Bill folds are clean and in good repair						
• Bills are legible and properly itemized						
Section Total			Out of	100		
Customer Amenities: Washrooms						
• Signs to restrooms easy to spot						
• Restrooms clean and odour free – Mirrors, toilet, wash basin clean and free of water stains.						
• Restrooms stocked with necessary toiletries						
• Floors are clean and free of spills and debris						
Section Total			Out of	20		



Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Customer View Lines						
<ul style="list-style-type: none"> • Server stations clean and organized 						
<ul style="list-style-type: none"> • Kitchen pass through, Kitchen doors and other egresses to the kitchen are clean and sanitary 						
<ul style="list-style-type: none"> • Site lines are consistent with brand's look and feel 						
<ul style="list-style-type: none"> • Volume from kitchen reasonable (staff are not yelling or cursing) 						
<ul style="list-style-type: none"> • No internal (company) memos, staff communiques, etc. are visible to the customer 						
Section Total			Out of	25		
Departure Touchpoints						
<ul style="list-style-type: none"> • Path to exit doors are well marked 						
<ul style="list-style-type: none"> • Path to exit doors is unobstructed 						
<ul style="list-style-type: none"> • Exit is easy for patron leaving empty handed 						
<ul style="list-style-type: none"> • Egress out of the store easy for patrons with packages 						
<ul style="list-style-type: none"> • Promotional signage on exit, relevant, clean and visible 						
<ul style="list-style-type: none"> • Exit Doors in working condition 						
<ul style="list-style-type: none"> • Exit doors and windows clean 						
Section Total			Out of	35		
Total of all sections			Out of			



The goal for the next 30 days	
TO START	
TO STOP	
TO CHANGE	



Customer Touchpoint Assessment: Retail

The property touchpoint assessment is intended to be used by business owners and managers to assess the various areas of their business that a customer comes into contact with, with a critical eye towards improvement.

Keep in mind, that this worksheet can only serve as a guideline – some points might not be relevant to you and your business – in which case, strike a line through the section or individual points that don't apply to you, and don't include them in your calculations.

Off-Property Impression	5	4	3	2	1	What needs to be done to make it better?
<ul style="list-style-type: none"> Website is up to date with address and contact information easily viewable 						
<ul style="list-style-type: none"> Social media presence consistent with target market, brand, relevant, and responsive 						
<ul style="list-style-type: none"> Review sites (yelp, trip advisor, google, etc.) reflect brand in positive light 						
<ul style="list-style-type: none"> Business listed on www.google.com/business - profile complete 						
Section Total			Out of	20		
Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Signage						
<ul style="list-style-type: none"> On the approach to my business, my external branding is obvious and consistent with all my corporate branding? 						
<ul style="list-style-type: none"> It can be seen clearly at a good distance to attract and direct new customers? 						
<ul style="list-style-type: none"> Signage is intact (no partially lit signs, burnt-out bulbs, etc)? 						
Section Total			Out of	15		
Parking Lot						
<ul style="list-style-type: none"> Was the parking assessable, clean and well lit? 						
<ul style="list-style-type: none"> Handicap spots well labeled, appropriately placed? 						
<ul style="list-style-type: none"> Priority parking for seniors? 						
<ul style="list-style-type: none"> Directional signage visible, well lit, in good repair? 						
<ul style="list-style-type: none"> Pathways clean and clear 						
<ul style="list-style-type: none"> Exit signs clearly marked 						
<ul style="list-style-type: none"> Traffic flow and egress out of parking lot is painless 						
Section Total			Out of	35		

Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Entrance to Building						
• Exterior decorations seasonally appropriate						
• Entrance is free of smokers						
• No employees are visible smoking outside						
• Entrance looks inviting and welcoming						
• Doors and windows clean						
• Doors and windows in good repair						
• Windows clean, window signs appropriate (relevant to the business)						
• Entrance well lit						
• No tripping hazard in threshold						
• Door powered for handicap access						
• Entrance mats clean and straight						
• Entrance mats don't form tripping hazard						
Section Total			Out of	60		
Service Egress						
• Where the customer needs to go is clear						
• Reception area is well lit and uncluttered						
• Customer amenities available at entrance						
For business not located on the main floor						
• Stairs in good repair						
• Internal directional signage visible and clear						
• Elevator / escalator in good repair						
• Hallways are clear and unobstructed						
• Signage for businesses easily identified						
• Entry mats are clean and well maintained						
Section Total			Out of	45		
Retail Customer Touchpoints						
• Shopping carts available and in good repair						
• Entrance displays well laid out, stocked and clean						
• Promotional signage visible and in good repair						
• Directional signage visible and in good repair						
• No hand-written signs are visible						
• Entry mats are clean and well maintained						
• Store is well lit						
• Directions to Returns, customer service, and departments clearly visible						
• No lingering odours are present						

Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
<ul style="list-style-type: none"> Temperature of space comfortable for customers (not too warm in the winter, for clients wearing coats) 						
<ul style="list-style-type: none"> Shelves are well stocked, product is “faced” 						
<ul style="list-style-type: none"> Empty spaces (sold out items) are filled to present a full face 						
<ul style="list-style-type: none"> Shelf talkers are clean, timely and relevant 						
<ul style="list-style-type: none"> End caps are well laid out, stocked and attractive 						
<ul style="list-style-type: none"> Floor displays are neat and tidy, with enough room for customers to clear 						
Section Total			Out of	75		
Customer Amenities: Washrooms						
<ul style="list-style-type: none"> Signs to restrooms easy to spot 						
<ul style="list-style-type: none"> Restrooms clean and odour free – Mirrors, toilet, wash basin clean and free of water stains. 						
<ul style="list-style-type: none"> Restrooms stocked with necessary toiletries 						
<ul style="list-style-type: none"> Floors are clean and free of spills and debris 						
Section Total			Out of	20		
Customer Amenities: Customer Service / Returns						
<ul style="list-style-type: none"> Customer service and returns desk clearly signed 						
<ul style="list-style-type: none"> Desks are uncluttered, with clear indicators where customers can be served 						
<ul style="list-style-type: none"> Area has ample room for patrons, carts, packages, etc. 						
Section Total			Out of	15		
Checkout Touchpoints						
<ul style="list-style-type: none"> Approach to cash clear and easy to navigate 						
<ul style="list-style-type: none"> Impulse racks fully stocked, easy to reach and well labelled 						
<ul style="list-style-type: none"> Cash area is uncluttered, and clean, including belts, bagging area 						
<ul style="list-style-type: none"> Signage is clean, visible, relevant and in good repair 						
<ul style="list-style-type: none"> No internal (company) memos, staff communiques, etc. are visible to the customer 						
<ul style="list-style-type: none"> Self-Checkout screens and surfaces are clean and unobstructed 						
Section Total			Out of	30		



Physical On-Site Impression	5	4	3	2	1	What needs to be done to make it better?
Departure Touchpoints						
• Path to exit doors are well marked						
• Path to exit doors is unobstructed						
• Exit is easy for patron leaving empty handed						
• Egress out of the store easy for patrons with packages						
• Promotional signage on exit, relevant, clean and visible						
• Exit Doors in working condition						
• Exit doors and windows clean						
Section Total			Out of	35		
Total of all sections			Out of			



The goal for the next 30 days	
TO START	
TO STOP	
TO CHANGE	