



CUSTOMER JOURNEY AUDIT

Instructions:

- Score your current systems across each phase of the Customer Journey.
- **Earn points** based on how developed your systems are (see scale below).
- **Maximum points per phase: 10.**
- Write down your **next step** to take that phase to the next level.

Scoring Scale (for each phase):

- **0-2 points** = Not developed (no system in place, ad hoc).
- **3-5 points** = Partially developed (some system, but inconsistent).
- **6-8 points** = Developed (system is consistent but could be stronger).
- **9-10 points** = Fully developed (system is strong, repeatable, and documented).

01 - Discovery & Enrollment (First Impressions)

Do you use a multi-pronged approach (ads, community engagement, referrals)? [0-10] ____

Do you have an 11-step enrollment process that's reviewed regularly? [0-10] ____

Does your messaging align with family values (convenience, warmth, transparency)? [0-10] ____

02 - Starting Classes (Onboarding)

Do new families receive a clear onboarding checklist (attire, drop-off, goals)? [0-10] ____

Do you host a "Welcome Week" or orientation to meet staff/instructors? [0-10] ____

Do you assign a class buddy or staff ambassador to support new students? [0-10] ____

03 - Building Connections (Engagement)

Do you run consistent community-building initiatives (themes, newsletters, touchpoints)? [0-10] ____

Do you provide progress notes or skill checklists regularly? [0-10] ____

Do you host seasonal events that build excitement and connection? [0-10] ____

04 - End-of-Season Moments (Celebration)

Do you celebrate milestones with certificates, tokens, or senior send-offs? [0-10] ____

Do you create family-centered photo/video opportunities during events? [0-10] ____

Do you collect post-season feedback via surveys? [0-10] ____

05 - Retention (Ongoing Journey)

Do you run an early-bird re-enrollment campaign with perks? [0-10] ____

Do you share personalized progress reports (photos/videos) with families? [0-10] ____

Do you reward loyalty with perks (VIP seating, early access, bundle options)? [0-10] ____



FINAL SCORING & IMPLEMENTATION PLAN

PHASE	POINTS EARNED	NOTES ON CURRENT SYSTEM
Discovery & Enrollment		
Onboarding		
Engagement		
Celebration		
Retention		
TOTAL		

✨ **BONUS: ADD +5 POINTS IF YOU WROTE SPECIFIC, CREATIVE NEXT STEPS FOR EVERY PHASE.**

Goal-Driven Reflection & Implementation Plan

USE THIS SECTION TO COMMIT TO CLEAR, ACTIONABLE STEPS. THE GOAL IS TO LEAVE THIS SESSION WITH AN **IMPLEMENTATION ROADMAP** YOU CAN BEGIN RIGHT AWAY.

1. Key Area of Focus (Choose ONE phase to prioritize):
2. Specific Goal for this Phase (SMART Goal: Specific, Measurable, Achievable, Relevant, Time-Bound):
3. First 3 Action Steps (to complete in the next 7 days):
 - 1.
 - 2.
 - 3.
4. Who is Responsible? (Assign a team member or yourself):
5. Timeline & Check-in (When will progress be reviewed?):
6. Success Measure (How will you know it's working?):