

Customer Experience Project Goals/Benefits Template

What: This template is to help define the goals of your CX project and the benefits that you expect to realize.

Why: Setting the goals and defining the benefits (and how they will be measured) ensures that everyone is on the same page.

When: Complete this template at the beginning of the CX project after determining the challenges/opportunities you intend to address.

Project: _____

Date: _____

Author: _____

Project Goals (Check all that apply)

- Increase brand recognition
- Generate more leads
- Convert more leads into customers
- Increase customer retention
- Increase revenue
- Lower Expenses
- Other _____

How will this be measured?

Customer Experience Goals (Check all that apply)

- Improve usability
- Increase functionality
- Reduce transaction times
- Increase efficiency
- Increase personalization
- Improve engagement
- Increase trust
- Make our customers feel valued

How will this be measured?
