

Building a Customer Experience Team: Health Check Exercise

How healthy is your customer experience function, really?

Score yourself from 1 (Never) to 5 (Always).

Use this to reflect, identify gaps, and decide what to improve first.

People & Roles

We have clear job descriptions and responsibilities	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
The team understands what tasks we own vs. what we don't	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
There is visible leadership or a team lead guiding priorities	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
We have enough resource to meet our current workload	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Processes & Structure

We have defined SLAs or response time targets	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Campaigns are briefed to us in a clear, structured way	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
We proactively debrief after peak periods or campaigns	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Enquiries are tagged/categorised to spot trends	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Tools & Tech

We use an email management system (not Outlook folders)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
We have access to dashboards or workload reporting	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
We can easily search and retrieve past correspondence	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Our CRM or supporter database is accurate and easy to use	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Culture & Learning

We make time to reflect on what's working and what isn't	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
We receive regular feedback internally and from supporters	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
We're recognised internally for the value we bring	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Our team feels calm, confident and clear in our purpose	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Building a Customer Experience Team: Scoring & Reflection

Total Score

0–25: Firefighting mode - Time to set structure and boundaries.

26–45: Functional but fragile - Prioritise clarity, tools, and insight sharing.

46–60: Strong foundations - Focus on influence, integration, and innovation.

60–80: High-performing - Now refine, measure, and share your impact.

Reflection

You've completed the Health Check Exercise, now use it to drive action and conversation.

Ask Yourself:

- What areas are we exceeding in - and why?
- What's dragging the team down - and why?
- What low-effort improvement can we test in the next 30 days?
- What high-effort improvement can we aim for in the next 6-12 months?
- What would help us earn a stronger voice in the organisation?

Make It Count

Your team doesn't need to be perfect, it just needs to be intentional.

Use this tool to start honest conversations, take small but meaningful action, and advocate for the value of your customer experience team.

Progress isn't made all at once. It's made consistently.

Revisit this in 6 months; re-score your team, reflect on what's changed, and take time to celebrate your achievements.

"Act as if what you do makes a difference. It does."

— William James