VALMAR

A 45-MINUTE WORKBOOK

The Customer Experience Audit

See your business the way your customers do.

For finding the friction that costs you sales — and fixing it.

PRESENTED BY VALMAR

OPENING

When was the last time you were your own customer?

You know your business from the inside. Your customers don't.

They never see the work happening behind the scenes. They experience your business one moment at a time — finding you online, landing on your site, asking a question, paying you, getting what they bought, needing help, deciding whether to come back.

Every one of those moments either builds confidence or chips away at it.

A confusing homepage. A form with too many fields. A checkout that takes four screens. A message nobody answered. A charge they don't recognize on their statement.

Each one looks small. Together, they're the reason someone chose a competitor.

The good news: friction is fixable, and most of it is cheap to fix. You don't need a rebrand or a new website. You need to walk your own customer journey, notice where it snags, and make a handful of things 1% better.

That's what this workbook is for.

INSTRUCTIONS

How to use this audit

Block out 45 minutes. Phone in hand. Do not do this from memory — memory is exactly where blind spots live.

You'll move through six stages of the customer journey. Each stage has eight statements to score and one hands-on exercise that takes a few minutes.

SCORE EVERY STATEMENT

- **2** — **Yes.** We do this well. A customer would agree.
- **1** — **Needs work.** It exists, but it's clunky, slow, or unclear.
- **0** — **No.** It's missing, or it's actively causing friction.

Score honestly. A generous score gets you a nice number and nothing else. Write the total for each stage in the box at the bottom of the page — you'll add them up at the end.

One rule: when you're unsure whether something counts as a 2 or a 1, it's a 1. If you have to think about it, your customer definitely had to.

Before you start, open a fresh browser window in private or incognito mode. You're logged in to everything and your browser remembers you. Your customer isn't and doesn't.

01

STAGE 01 OF 06

Discovery

Can they find you, and does what they find look credible?

Before anyone can buy from you, they have to find you and believe you're real. Most of this stage happens before a customer ever touches your website.

SCORE EACH STATEMENT 0, 1 OR 2	SCORE
We show up in search results for what we *do*, not just for our company name.	
A first-time visitor understands what we sell within five seconds of landing on our homepage.	
Our hours, phone number, and address are correct everywhere they appear online.	
Our Google Business Profile is complete, current, and has real photos.	
Our website is fast and fully usable on a phone.	
Our reviews would make a stranger feel safe choosing us.	
We've posted or updated something publicly in the last 30 days.	
A visitor can tell in one pass why we're the better choice over the competitor down the street.	

STAGE 01 TOTAL ____ / 16

DO THIS NOW · STAGE 01

Search for yourself

In your incognito window, run all three of these searches:

1. Your business name
2. Your main product or service + your city
3. The problem you solve, in your customer's words + your city

Did you appear in searches 2 and 3? ☐ Yes ☐ No

Who appeared above you?

What do they say about themselves that you don't?

Now the hard question. Pretend you've never heard of your company. Based only on what's visible on that screen — would you pick you?

☐ Yes ☐ Maybe ☐ No

NOTES

02

STAGE 02 OF 06

Consideration

How easy is it to decide “yes”?

Finding you isn't buying from you. In this stage, a customer is hunting for three things: answers, proof, and a reason to trust you. Every question you leave unanswered is a reason to keep shopping.

SCORE EACH STATEMENT 0, 1 OR 2	SCORE
Pricing — or exactly how to get a price — is easy to find and easy to understand.	
The questions customers ask us most are answered on our website.	
We address the top objection or hesitation head-on instead of hoping nobody brings it up.	
Reviews, testimonials, or customer results are visible without hunting for them.	
It's obvious what to do next — one clear action, not five competing ones.	
There's more than one way to reach us, and each one works.	
We respond to new inquiries within one business day, every time.	
Our sales process moves at the customer's pace and doesn't add steps they didn't ask for.	

STAGE 02 TOTAL ____ / 16

DO THIS NOW · STAGE 02

The three questions

Write down the three questions customers ask most before they buy. Not what you wish they asked — what they actually ask.

1 ______________________________

Can they find this answer without contacting you? ☐ Yes ☐ Partly ☐ No

2 ______________________________

Can they find this answer without contacting you? ☐ Yes ☐ Partly ☐ No

3 ______________________________

Can they find this answer without contacting you? ☐ Yes ☐ Partly ☐ No

Every “No” above is a customer who had to work to buy from you — or who didn't bother. Answering these three questions publicly is usually an afternoon of work and one of the highest-return things on this entire list.

Then test your response time. Submit your own contact form or request a quote, using a personal email address.

Time submitted ______________ Time you got a reply ______________

Did you get any immediate confirmation that it went through? ☐ Yes ☐ No

03

STAGE 03 OF 06

Purchase & payment

How hard is it to give you money?

The customer has already decided. Everything that happens now is pure downside risk — this is the one stage where you can only lose. Abandoned carts and failed payments are the most expensive friction in your business because you've already paid to get that customer here.

SCORE EACH STATEMENT 0, 1 OR 2	SCORE
Our checkout or payment process is simple enough that nobody needs instructions.	
We only ask for information we genuinely need to complete the sale.	
The payment experience works properly on a phone, including the keyboard and card fields.	
We accept the payment methods our customers actually want to use.	
The total price — including tax, shipping, and any fees — is clear before the final click.	
Receipts and confirmations arrive within a minute and are easy to read.	
The business name on the customer's bank statement is one they'll recognize.	
When a payment fails, the customer is told why and what to do next.	

STAGE 03 TOTAL / 16

DO THIS NOW · STAGE 03

Buy from yourself

Run your own checkout on your phone, start to finish. If you can't complete a real transaction, go as far as the final screen.

Time to complete ________ Screens or steps ________

Fields you filled in ________

Anything confusing?

____

Anything you could delete entirely?

____

Would you call it easy? ☐ Yes ☐ No

Then check your statement descriptor. Pull up a recent card statement — yours or a customer's, with permission — and find your charge.

What it says ____

Would a customer recognize it? ☐ Yes ☐ No

Why this one matters more than it looks. An unrecognized name on a statement is one of the leading causes of chargebacks. The customer isn't disputing your product — they don't know who charged them. Every chargeback costs you the sale, the fee, and a mark against your account. This is usually a 10-minute fix with your payment processor.

One question worth sitting with: what percentage of people who reach your checkout actually finish? You don't need the exact number. You just need to stop assuming that getting someone to checkout is the finish line. It isn't.

04

STAGE 04 OF 06

Delivery & onboarding

What happens in the first 48 hours?

The sale is the start of the relationship, not the end of it. This window sets the tone for everything after it — and it's the stage most businesses never look at, because from the inside it feels like the work is already done.

SCORE EACH STATEMENT 0, 1 OR 2	SCORE
The customer knows immediately and unmistakably that their purchase went through.	
They know exactly what happens next, and roughly when.	
The timeline we set is one we actually hit — we don't promise our best case.	
They know who to contact, by name or by channel, if something's wrong.	
Our confirmation and welcome messages are useful, not just automated noise.	
We never ask a customer for information they've already given us.	
When something slips, they hear it from us before they have to ask.	
What they receive matches what we sold them. No surprises.	

STAGE 04 TOTAL / 16

DO THIS NOW · STAGE 04

Read your own welcome

Pull up the very first message a customer gets after buying — the receipt, confirmation email, text, or welcome packet. Read it as if you'd never seen it. Check off every question it clearly answers.

- [ ] What just happened?
- [ ] What did I pay, and for what?
- [ ] What happens next?
- [ ] When does it happen?
- [ ] Is there anything I need to do?
- [ ] Who do I contact if something's wrong?

HOW MANY DID YOU CHECK? ______ / 6

Anything unchecked is a support call you're going to get, or a customer quietly wondering whether they made a mistake. Adding two sentences to one automated email is often the single cheapest improvement in this entire workbook.

WHAT I'M ADDING TO THAT MESSAGE

05

STAGE 05 OF 06

Support

What happens when something goes wrong?

Great customer experiences aren't the ones without problems. They're the ones where the problem got handled well. A customer whose issue you fixed quickly is often more loyal than one who never had an issue at all.

SCORE EACH STATEMENT 0, 1 OR 2	SCORE
Finding out how to reach us takes under ten seconds on our website.	
A customer can get to a real person when they need one.	
We tell people when to expect a response — and we meet it.	
Nobody has to explain their problem twice to two different people.	
Our team has the access and authority to solve common problems without escalating.	
While an issue is open, the customer hears from us without having to chase us.	
The customer is clearly told when their issue is resolved.	
After a significant problem, we follow up to make sure it stayed fixed.	

STAGE 05 TOTAL / 16

DO THIS NOW · STAGE 05

Mystery shop yourself

Pick two of these and actually do them today. Use a personal phone and email address.

Call your main business line as a customer would

Rings before answered ______ Reached a person? ☐ Yes ☐ No

If you got voicemail — does the greeting say when someone will call back? ☐ Yes ☐ No

Email or message your support channel with a real, ordinary question

Time sent ______ Time answered ______

Was the answer complete, or did it create another round trip? ☐ Complete ☐ Round trip

Find your own contact information on your website, on a phone, in under ten seconds

Seconds it took ______

WHAT SURPRISED YOU?

06

STAGE 06 OF 06

Retention & return

Do they come back — and do you notice when they don't?

Keeping a customer costs a fraction of winning a new one, and most businesses spend almost all of their attention on the winning. This is the stage with the most money hiding in it.

SCORE EACH STATEMENT 0, 1 OR 2	SCORE
We can tell the difference between a repeat customer and a first-timer.	
Customers hear from us between purchases in a way that's genuinely useful, not just promotional.	
Reordering, renewing, or booking again takes less effort than the first time did.	
For recurring payments, we catch expiring and outdated cards before the payment fails.	
We ask for reviews and feedback at the moment the customer is happiest, not at random.	
A happy customer has an easy, obvious way to refer someone.	
We notice when a good customer stops buying — and we reach out.	
Loyal customers get treated at least as well as brand-new ones.	

STAGE 06 TOTAL / 16

DO THIS NOW · STAGE 06

Find your quiet churn

Name three customers who used to buy regularly and haven't recently.

1 ______________________

2 ______________________

3 ______________________

Do you know why any of them stopped? ☐ Yes ☐ No

Most of the time the answer is no — and most of the time the reason is unremarkable. They moved, they forgot, a card expired and the payment failed, or something small annoyed them and they didn't mention it. None of that is a lost cause. A single honest “we noticed you haven't been in — anything we could have done better?” wins back more customers than most ad budgets.

If you bill customers on a recurring basis, check this one number with your processor: how many payments failed last month because of an expired or replaced card?

Failed payments last month ______________

That's revenue you already earned from customers who never chose to leave. Most modern processors can update stored card numbers automatically.

RESULTS

Your scorecard

Bring your six stage totals here.

STAGE	SCORE
01 Discovery	/ 16
02 Consideration	/ 16
03 Purchase & payment	/ 16
04 Delivery & onboarding	/ 16
05 Support	/ 16
06 Retention & return	/ 16

TOTAL / 96

YOUR LOWEST-SCORING STAGE

YOUR HIGHEST-SCORING STAGE

What your score means

84–96 STRONG

Your customer experience is a real competitive advantage. Protect it. Your risk isn't friction, it's drift — re-run this audit every six months, because things quietly break.

66–83 SOLID, WITH SOFT SPOTS

The fundamentals work. One or two stages are dragging the rest down, and they're almost certainly costing you sales you'll never hear about. Fix your lowest stage first.

48–65 FRICTION IS COSTING YOU REAL MONEY

Customers are leaking out at several points in the journey. The upside here is that the fixes are usually obvious once you've looked — and you just looked. Pick three and start.

Below 48 START WITH THE BASICS

Don't try to fix everything. Go to Stage 03 and Stage 01, in that order: make it easy to pay you, and make sure people can find you. Everything else can wait a month.

A low score is not bad news. Every point on this page is a point you can win back, usually without spending money. Businesses that never run this audit have the same problems — they just don't know where they are.

Pick three

Go back through the workbook and find every statement you scored a 0. Then pick the three that would take the least effort to fix and make the biggest difference.

Three. Not thirty. Three things you'll actually finish.

FIX #1

What's broken ____________________

What “fixed” looks like ____________________

Who owns it __________ Done by __________

FIX #2

What's broken ____________________

What “fixed” looks like ____________________

Who owns it __________ Done by __________

FIX #3

What's broken ____________________

What “fixed” looks like ____________________

Who owns it __________ Done by __________

ACTION PLAN

The next 30 days

WEEK 1 **Fix what's free**	Update your Google Business Profile. Correct your hours and phone number everywhere they're wrong. Add the answers to your three most-asked questions to your website. None of this costs anything but an afternoon.
WEEK 2 **Clear the path to payment**	Delete every checkout field you don't strictly need. Test the whole flow on a phone. Confirm your statement descriptor is recognizable. Make sure failed payments trigger a message that tells the customer what to do.
WEEK 3 **Tighten the handoff**	Rewrite your first post-purchase message so it answers all six questions from page 11. Set a response-time standard your team can actually hit, then publish it.
WEEK 4 **Re-check and reach out**	Ask three recent customers what was harder than it should have been. Contact three customers who've gone quiet. Then re-score your lowest stage and see what moved.

RE-AUDIT DATE

CLOSING

One last thing

Most of this workbook you can act on yourself this week, with some exceptions.

Checkout friction, statement descriptors, failed recurring payments, and chargebacks all live inside your payment processing — and most business owners have never had anyone walk through that part with them.

Free Payments Experience Review

We'll look at your checkout flow, your statement descriptor, your failed-payment handling, and your current processing statement, and tell you plainly what's working and what's costing you. No obligation, no pitch deck.

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1-866-825-6271 · sales@valmarmerchants.com · vlmr.com

However you use it — thanks for taking the time to look at your business the way your customers do. Most owners never do.