

Designing Customer Experiences That Bring People Back

From Welcome to Return Visit: Turning Great Service into Your Best Marketing

Workshop Workbook

Name: _____

Business: _____

Date: _____

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Before you start

Everything in this workbook is about your own business. Use real answers from how things run today, not how you would like them to be.

The examples beneath each box are illustrations only. They show what a good answer looks like and are not from any particular business.

Your starting number

On a scale of 0 to 10, how confident are you that you could find the weakest moment in your customer experience, give your team the right words for it and deliver one change to every customer for the next 30 days?

My number now, 0 to 10: _____

Keep it. You will answer the same question again at the end.

How the three exercises connect

Exercise	What you do	What you finish with
1. Customer Experience Loop Audit	Score your business across the six stages	Your score for each stage, and the two stages where customers slip away
2. Customer Experience Playbook	Build the words and actions your team uses at each stage, starting with your lowest two	One page per stage, each checked for whether it is ready to use
3. 30-Day Customer Experience Plan	Choose ONE stage and commit to it for 30 days	A signed plan with one action, a weekly check and a team briefing

The six stages, used in every exercise: Dream, Plan, Book, Experience, Share, and Thank, Refer & Repeat.

Exercise 1. The Customer Experience Loop Audit That Will Show You Where Customers Slip Away

Before you begin

You have 20 minutes, including a table debrief. Score how your business runs on a normal day, not your best day.

Example answers follow each field. They show what a good answer looks like and are not from any particular business. Your answers will look different.

STEP 1. Score each stage as it runs today

Score each statement Yes (5), Sometimes (3) or Not yet (0). Read the example first so you know what a Yes looks like.

Dream. When people come across my business online or hear about it, they find a clear reason to want to visit.

Score: ☐ Yes (5) ☐ Sometimes (3) ☐ Not yet (0)

What a Yes looks like, illustration only.

Recent photos, current opening hours and a reply to every review, so someone who has never visited can picture a good experience.

Plan. When someone asks about us or our area, I give them information that makes it easy and exciting to say yes.

Score: ☐ Yes (5) ☐ Sometimes (3) ☐ Not yet (0)

What a Yes looks like, illustration only.

Every phone call or message gets a clear answer plus one reason to come, answered the same day.

Book. When a customer is about to commit, with a booking, order or check-in, I make that moment feel welcoming and worth it.

Score: ☐ Yes (5) ☐ Sometimes (3) ☐ Not yet (0)

What a Yes looks like, illustration only.

Every customer gets a warm welcome and a question about what they are hoping for, not just "What can I get you?"

Experience. Every customer I serve leaves feeling seen, helped and pointed towards something they would not have found without me.

Score: ☐ Yes (5) ☐ Sometimes (3) ☐ Not yet (0)

What a Yes looks like, illustration only.

Every customer leaves with at least one recommendation that suits them, with the reason and how to get there.

Share. I create moments worth sharing, and I give every customer an easy, genuine invitation to share them.

Score: ☐ Yes (5) ☐ Sometimes (3) ☐ Not yet (0)

What a Yes looks like, illustration only.

Every customer is asked, in the same words, for an honest review. The review link or QR code is easy to find, there is something worth photographing, and every review gets a reply.

Thank, Refer & Repeat. I close every interaction in a way that opens the door for the customer to come back, or send someone else.

Score: ☐ Yes (5) ☐ Sometimes (3) ☐ Not yet (0)

What a Yes looks like, illustration only.

Every customer gets a thank-you within 48 hours, with a reason to return, an invitation to join our email list and a local business we are happy to send them to.

STEP 2. Add up your score and find your band

My total: _____ out of 30

25 to 30, Strong loop. Your loop is largely active. Your next gain is in your lowest stage.

15 to 24, Building. You have real strengths, and at least one stage is costing you customers.

Below 15, Foundation first. One stage at a time.

STEP 3. Look closely at your two lowest stages

Answer the three questions below for your lowest stage, then again for your second lowest.

My lowest stage: _____

What happens at this stage today?

Example answer, illustration only.

Customers tell us at the counter how much they enjoyed it, we thank them, and they leave. Nobody mentions a review. (Share)

Why do customers slip away here?

Example answer, illustration only.

Asking feels pushy, so nobody does it, and there is no set moment in our day for it. (Share)

What does this cost you?

Example answer, illustration only.

Happy customers leave no review, so people searching for us mostly see older, mixed reviews. (Share)

My second lowest stage: _____

What happens at this stage today?

Why do customers slip away here?

What does this cost you?

MY LOOP AT A GLANCE

You will copy this into Exercises 2 and 3.

Stage	My score
Dream	
Plan	
Book	
Experience	
Share	
Thank, Refer & Repeat	
Total	/ 30

My two lowest stages: _____ and _____

Your answer to the module question

Why do customers who enjoyed their visit still not review, recommend or return?

Answer it for your own business, in one or two sentences:

Your completed Customer Experience Loop Audit

It shows your score for each stage, your band and why customers slip away at your two lowest stages. In Exercise 2 you will build your Playbook, starting with those two stages.

Privacy

Before using AI, replace your business name with "my business" and leave out customer names. Your scores and descriptions of your own processes carry no privacy risk.

AI acceleration option

I'm completing a Customer Experience Loop Audit for my small business.

My scores (Yes 5, Sometimes 3, Not yet 0) are: Dream [], Plan [], Book [], Experience [], Share [], Thank, Refer and Repeat [].

My notes on my two lowest stages: [paste].

Produce my finished audit: a table of all six scores, my total out of 30 and band (25 to 30 Strong loop, 15 to 24 Building, below 15 Foundation first), then for my two lowest stages: what happens now, why customers slip away and what it costs me. Plain Australian English. No preamble.

Exercise 2. The Customer Experience Playbook That Will Give Your Team the Right Words at Every Stage

Before you begin

You will build the pages in four short rounds, in stage order. Put a star on the pages for your two lowest stages.

Example answers follow each field. They show what a good answer looks like and are not from any particular business. Your answers will look different.

Your Loop Audit showed where customers slip away. Your Playbook now gives you and your team the right words and actions at every stage, starting with your lowest two.

MY LOOP AT A GLANCE (copied from Exercise 1)

Stage	My score
Dream	
Plan	
Book	
Experience	
Share	
Thank, Refer & Repeat	
Total	/ 30

My two lowest stages: _____ and _____

Each page below repeats the audit statement, so you do not need to look back. Each page ends with three quick questions to decide whether it is ready to use.

Page 1. Dream

When people come across my business online or hear about it, they find a clear reason to want to visit.

My score from Exercise 1: _____

Search for your business as a new customer would. What is the first thing they see?

One thing you will fix this month:

Example answer, illustration only.

Instead of: photos from three years ago and five reviews with no reply.

Try: this season's photos, current hours and a short, warm reply to every review.

Is this page ready?

Question	Yes	No
Have I written the words in my own voice?	☐	☐
Could my team use it tomorrow?	☐	☐
Can we start without buying or setting anything up?	☐	☐

Three Yes = Ready now. One No = Needs a trial. Two or more No = Not yet.

My rating: ☐ Ready now ☐ Needs a trial ☐ Not yet

Page 2. Plan

When someone asks about us or our area, I give them information that makes it easy and exciting to say yes.

My score from Exercise 1: _____

The question customers ask most before deciding:

Example answer, illustration only.

"What time are you open?"

Your answer, written to make saying yes easy:

Example answer, illustration only.

Instead of: "We're open nine to five."

Try: "We're open nine to five. Come after three and you'll get the afternoon sun on the deck."

Is this page ready?

Question	Yes	No
Have I written the words in my own voice?	☐	☐
Could my team use it tomorrow?	☐	☐
Can we start without buying or setting anything up?	☐	☐

Three Yes = Ready now. One No = Needs a trial. Two or more No = Not yet.

My rating: ☐ Ready now ☐ Needs a trial ☐ Not yet

Page 3. Book

When a customer is about to commit, with a booking, order or check-in, I make that moment feel welcoming and worth it.

My score from Exercise 1: _____

Your welcome line:

Example answer, illustration only.

Instead of: "Next."

Try: "Hi, welcome in. Have you been with us before?"

Your three discovery questions:

Example answer, illustration only.

Instead of: "How are you today?"

Try: "What brings you in today?", "How did you hear about us?" and "What would make today a good one?"

Tip: keep a note of how people heard about you. After a month, you will know which of your marketing is bringing people in.

Is this page ready?

Question	Yes	No
Have I written the words in my own voice?	☐	☐
Could my team use it tomorrow?	☐	☐
Can we start without buying or setting anything up?	☐	☐

Three Yes = Ready now. One No = Needs a trial. Two or more No = Not yet.

My rating: ☐ Ready now ☐ Needs a trial ☐ Not yet

Page 4. Experience

Every customer I serve leaves feeling seen, helped and pointed towards something they would not have found without me.

My score from Exercise 1: _____

Three local recommendations you would genuinely make:

Be specific	Add the reason	Make it easy

Example answer, illustration only.

Instead of: "There are a few cafés in town."

Try: "Go to the bakery two doors down. Their pies sell out by 11, so go early. Turn left out our door, it's the blue awning."

One memorable moment your team can offer every customer at no or low cost:

Example answer, illustration only.

A handwritten card with our three favourite local spots, given with every order.

Is this page ready?

Question	Yes	No
Have I written the words in my own voice?	☐	☐
Could my team use it tomorrow?	☐	☐
Can we start without buying or setting anything up?	☐	☐

Three Yes = Ready now. One No = Needs a trial. Two or more No = Not yet.

My rating: ☐ Ready now ☐ Needs a trial ☐ Not yet

Page 5. Share

I create moments worth sharing, and I give every customer an easy, genuine invitation to share them.

My score from Exercise 1: _____

Your review ask, the same words for every customer:

When it happens: _____ **Who asks:** _____

Example answer, illustration only.

Instead of: "If you enjoyed it, leave us a review." This asks only happy customers, which Google does not allow.

Try: "Thanks so much for coming in. If you have a moment, we'd value an honest Google review. It helps other people find us."

Where your Google review link or QR code will be easy to find (the counter, menu, room card, receipt or thank-you message):

Example answer, illustration only.

A QR code on the counter and on every room card, and the review link in our thank-you message.

The moment or spot customers are most likely to photograph:

Example answer, illustration only.

The view from the deck at sunset.

How you will invite customers to tag you on social media:

Example answer, illustration only.

Instead of: saying nothing and hoping they tag you.

Try: "If you post any photos today, tag us @[yourhandle]. We love seeing them."

Before you reshare a customer's post, ask their permission and credit them. Never offer a discount or gift for a review or a tag.

Respond to one real review of your business with the four-part response:

Acknowledge	Be specific	Redirect (negative reviews)	Invite back

Example answer, illustration only.

Acknowledge: Thanks for taking the time to write this.

Be specific: You're right, Saturday lunch was slow.

Redirect: We've added a second person on the counter at weekends.

Invite back: We'd love the chance to show you a better Saturday.

Is this page ready?

Question	Yes	No
Have I written the words in my own voice?	☐	☐
Could my team use it tomorrow?	☐	☐
Can we start without buying or setting anything up?	☐	☐

Three Yes = Ready now. One No = Needs a trial. Two or more No = Not yet.

My rating: ☐ Ready now ☐ Needs a trial ☐ Not yet

Page 6. Thank, Refer & Repeat

I close every interaction in a way that opens the door for the customer to come back, or send someone else.

My score from Exercise 1: _____

In the room, write your thank-you message. Finish the rest of this page after today.

Your thank-you message, sent within 48 hours, including a review invitation:

Example answer, illustration only.

Instead of: "Thank you for your booking."

Try: "Thanks for staying with us this week. We loved having you. If you have a moment, an honest Google review would help other travellers find us: [link]. And if you're back this way, the markets run on the first Sunday of every month."

This message goes to every customer, not only the ones you think enjoyed it, and never with a discount or gift attached.

One nearby business you will build a referral partnership with:

Example answer, illustration only.

The winery down the road. We send guests there for tastings, and they send us people looking for a place to stay.

One genuine reason for customers to return:

Example answer, illustration only.

Our seasonal menu changes every March and September.

How you will invite customers to join your email list:

Example answer, illustration only.

Instead of: adding every customer's email from their booking without asking.

Try: "Would you like to hear when our new season menu starts? You can join our list here, and unsubscribe any time."

Only add people who say yes, and make it easy to unsubscribe.

Is this page ready?

Question	Yes	No
Have I written the words in my own voice?	☐	☐
Could my team use it tomorrow?	☐	☐
Can we start without buying or setting anything up?	☐	☐

Three Yes = Ready now. One No = Needs a trial. Two or more No = Not yet.

My rating: ☐ Ready now ☐ Needs a trial ☐ Not yet

Your answer to the module question

How do you turn your best customer moments into something every person on your team delivers, every time?

Answer it for your own business, in one or two sentences:

Your completed Customer Experience Playbook

It gives your team the right words at every stage and shows which pages are ready to use now. In Exercise 3 you will choose one of them for your 30-day plan.

Privacy

Replace customer names in reviews with "the guest", and your business name with "my business". Local businesses you recommend are public, so you can name them.

AI acceleration option

I'm building a Customer Experience Playbook for my small business, based on my Customer Experience Loop Audit.

My audit scores: [paste Loop at a Glance]. My two lowest stages: [].

Using my notes below, produce one page for each of the six stages (Dream, Plan, Book, Experience, Share, Thank Refer and Repeat), starting with my two lowest stages. For each page give the words or action my team will use and one "Instead of / Try" example.

Share must include: a review ask for every customer (no incentives, no asking only happy customers, no pressure to review on the spot), where my review link or QR code goes, a photo moment, an invitation to tag us, and a four-part response (Acknowledge, Be specific, Redirect, Invite back) to the review I've pasted.

Thank, Refer and Repeat must include: a 48-hour thank-you message with a review invitation, a referral partner, a reason to return and an invitation to join our email list (by consent only).

My notes: [paste]. Plain Australian English. No preamble.

Exercise 3. The 30-Day Plan That Will Turn One Priority into a Team Habit

Before you begin

You have 15 minutes for Steps 1, 2 and 3, your start date in Step 5, then signing in Step 6. Complete the Team Briefing Guide in Step 4 after the session.

Example answers follow each field. They show what a good answer looks like and are not from any particular business. Your answers will look different.

Your Playbook shows which pages are ready to use, and your audit shows where customers slip away. This plan commits you to one of them, for 30 days.

STEP 1. Choose ONE stage

Copy in your scores and Playbook ratings, then tick ONE stage. Choose your lowest-scoring stage that is marked Ready now. If neither of your two lowest stages is ready, choose the lowest one marked Needs a trial, and make getting it ready your task for week one.

Stage	My audit score	My Playbook rating	Tick ONE
Dream			☐
Plan			☐
Book			☐
Experience			☐
Share			☐
Thank, Refer & Repeat			☐

Why this stage, using your audit:

Example answer, illustration only.

Share scored 0. Customers leave happy but nobody asks for a review, and my Share page is ready now.

STEP 2. Define exactly what happens

What we will do, when it happens and who does it:

--

Example answer, illustration only.

Whoever is on the counter asks every customer for an honest review, using our Playbook words, as they hand back the customer's card.

STEP 3. Decide how you will know it is working

You will check two things each week, in about five minutes:

A weekly team check-in. At the end of each week, ask your team one question about your stage and score it the same way as your audit: Yes (5), Sometimes (3) or Not yet (0).

One number you already have. Check it once a week in a system you already use.

Stage	Weekly team question	Number you already have
Dream	Did we reply to every new review this week?	New reviews and replies, in Google Business Profile
Plan	Did every enquiry get an answer the same day?	Unanswered messages or missed calls at the end of the week
Book	Did we welcome every customer with a discovery question?	Once a week, watch or listen to 10 customers during a busy hour and note how many got one
Experience	Did every customer leave with a recommendation?	Reviews that mention a recommendation
Share	Did we ask every customer for a review and invite them to tag us?	New Google reviews and new social media tags or mentions this week
Thank, Refer & Repeat	Did every customer get a thank-you within 48 hours and an invitation to join our email list?	Thank-you messages sent, and new email subscribers this week, in your email or booking system

My weekly team question:

The number I will check:

Where I am starting from

My audit score for this stage: _____ **This number over the last month:** _____

My goal: a Yes (5) from the team every week, and the number moving in the right direction.

Example answer, illustration only.

Every Friday I'll ask in our team group chat, "Did we ask every customer for a review and invite them to tag us?" Every Monday I'll check new Google reviews and tags. Starting point: Share scored 0, with 2 new reviews and 1 tag last month.

STEP 4. Brief your team with the Team Briefing Guide

Your team delivers this plan, so brief them by day 7.

Who will model it (your two or three strongest people):

When you will run the briefing (20 to 60 minutes, before or after a shift):

Your opening question. Let the team talk. That conversation is the training.

Example answer, illustration only.

"What's one thing a customer thanked us for this week, and why?"

Practise together. Read out the words you wrote on your Playbook page for this stage, the "Try" line. In pairs, one person plays the customer and the other says the words. Swap, and keep going until it sounds like you, not a script.

The words we will practise:

Example answer, illustration only.

"Thanks so much for coming in. If you have a moment, we'd value an honest Google review. It helps other people find us."

Celebrate the wins. Where you will share them, and what counts as a win:

Example answer, illustration only.

In our team group chat, we'll call out every review ask made and every recommendation a customer thanked us for.

STEP 5. Set your milestones

Milestone	What will be true
Start date	
Day 7	Action running, team briefed
Day 14	Two weekly check-ins done and the number checked
Day 30	Action delivered to every eligible customer, every new review answered within 48 hours, audit re-scored
If this does not work, my next stage	

STEP 6. Commit

I commit to one stage, one action and one weekly check for the next 30 days.

Signed: _____ Date: _____

Your answer to the module question

What evidence will prove, 30 days from now, that your customers are experiencing the change?

Answer it for your own business, in one or two sentences:

Your three finished documents

The Customer Experience Loop Audit showed you where customers slip away.

The Customer Experience Playbook gave your team the right words at every stage.

This 30-Day Plan turns one stage into a team habit.

On day 30, re-score your audit and choose your next stage.

Privacy

Use "my business" and staff roles rather than names. Your weekly check-ins and numbers carry no privacy risk.

AI acceleration option

I'm creating a 30-Day Customer Experience Plan based on my Customer Experience Loop Audit and Playbook.

My audit scores: [paste]. My Playbook ratings for each stage: [paste].

Help me choose ONE stage only, justified by my audit, and produce my finished plan with: the exact action (what, when, who); a weekly team question scored Yes 5, Sometimes 3 or Not yet 0; one number I already have in Google Business Profile, my inbox, email or booking system; a Team Briefing Guide (who models it, when, an opening question, the words to practise, how we celebrate wins); milestones at days 7, 14 and 30; a day-30 re-audit; my next stage if this does not work; and lines for start date, signature and date.

One stage only. Plain Australian English. Output only the completed plan. No preamble.

Your closing number

On a scale of 0 to 10, how confident are you that you could find the weakest moment in your customer experience, give your team the right words for it and deliver one change to every customer for the next 30 days?

My number now, 0 to 10: _____ **My number at the start:** _____

What changed?

This week

Print your plan, sign it and put it where your team will see it.

Brief your team within seven days, using your Team Briefing Guide.

Set two weekly reminders in your phone: one for your team question, one for your number. Five minutes each.