Customer Experience Assessment

Use this tool to evaluate your store the way a first-time customer would. Complete it during the walkthrough or independently with your team. Aim for quick notes and honest scores, then turn insights into a 30-day action plan.

Store Name: _____

Evaluator(s): _____ **Date/Time:** _____

Weather/Conditions (if relevant to exterior): _____

Scoring for each item: *1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent*

A. EXTERIOR & FIRST IMPRESSION (CURB APPEAL)

Observe: visibility, windows, cleanliness, signage (hours/socials), landscaping/planters, accessibility, emotional vibe

Score each item 1–5 and add brief notes where helpful.

1. Visibility from parking/sidewalk – Is the front area clear of debris/trash? Sidewalk/entry clean? Does it need power washing?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent*) = _____

Notes:

2. Storefront windows – Do windows depict the business clearly? Seasonal/current? Clean and attractive?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent*) = _____

Notes:

3. Door signage accuracy & readability – If hours are posted, do they match what's online?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

4. Building signage condition – Good condition, readable, current logo; not faded or outdated.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

5. Accessibility of entry – Ramp/door swing/obstructions addressed; easy to enter.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

6. Overall safety & invitation – Any maintenance needs (paint, awning, repairs)? Colors align with brand?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

7. Landscaping/planters – Visually appealing, well-maintained, no dead or overgrown areas.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

What impressed me: _____

What created friction:_____

B. ENTRY & FIRST 10–15 SECONDS

Observe: lighting, scent, cleanliness, greeting, first focal point (power wall/front table)

Score each item 1–5 and add brief notes where helpful.

1. Lighting quality – Bright, consistent, flattering; does it need updating?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

2. Overall scent & cleanliness – Neutral/pleasant; no strong odors or clutter.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

3. Greeting/acknowledgment – Friendly greeting within ~15 seconds of entering?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

4. Immediate focal display – Attractive entry display that draws the eye and orients the shopper.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

5. Entry housekeeping – Is there anything upon entry that does not belong?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

6. Floors & walls condition – Flooring clean and in good repair; paint/touch-ups needed? Colors support the brand/products?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

First three feelings a shopper might have:_____

What would make me linger longer: _____

C. MAIN SHOPPING ZONE & MERCHANDISING

Observe: aisle spacing/flow, grouping logic, cross-merch opportunities, pricing visibility, inventory levels, accessibility

Score each item 1–5 and add brief notes where helpful.

1. Aisle spacing & flow – Easy to navigate with logical pathways.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

2. Product grouping logic – By need/theme/usage; easy to understand.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

3. Cross-merchandising – Are there clear add-on opportunities throughout the store?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

4. Pricing visibility – Price is easy to find on 90%+ of items.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

5. Inventory presentation – Full but not cluttered; grouped in appealing, sensible ways.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

6. Accessibility for most shoppers – Height/spacing appropriate; staff available for assistance if needed.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

Top 1–2 displays that sell the story well: _____

Where I got 'stuck' or confused _____

One small layout move that improves flow _____

D. Customer Experience Touchpoints

Observe: staff availability/posture, product knowledge, proactive help, education moments, suggestive selling

Score each item 1–5 and add brief notes where helpful.

1. Staff visibility & approachability – Are team members easy to find and welcoming?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

2. Friendly, helpful demeanor – Do they appear engaged and happy to help? Is there attention focused on the customers?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

3. Proactive assistance – Is help offered within 2–3 minutes without pressure?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

4. Needs assessment – Do staff ask questions to understand shopper needs?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

5. Product knowledge – Can staff answer common questions or demonstrate?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

6. Education moments – Materials/demos provided at natural points in the journey.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

7. Suggestive selling – Add-on suggestions tied to the shopper's needs.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

Best interaction I witnessed (words/behavior):_____

Training opportunity I noticed:_____

E. CHECKOUT AREA & FAREWELL

Observe: counter organization, impulse/add-ons, loyalty capture, clarity of return policy, final experience

Score each item 1–5 and add brief notes when helpful.

1. Counter organization & payment options – Clean/tidy; cash/card/tap-to-pay available.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

2. Alternate checkout option – Self-checkout or mobile checkout available?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

3. Impulse/add-on opportunities – Purposeful options present at checkout.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

4. Loyalty & contact capture – Loyalty presented; email/phone captured appropriately.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

5. Returns policy clarity – Return/exchange information visible or stated.

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

6. Thank-you & invitation back – Is there a clear farewell and reason to return?

Score (*1=Needs attention 2=Below average 3=Adequate 4=Good 5=Excellent)* = _____

Notes:

One change to raise average purchase amount:_____

One change to increase repeat visits:_____

SNAPSHOT SCORES (AVERAGE THE ITEM SCORES IN EACH SECTION)

Exterior & First Impression:		Customer Experience:	
Entry & First 15 Seconds:		Checkout & Farewell:	
Merchandising & Flow:			

Overall Average (add all five section averages ÷ 5): _____ / 5 = _____