(Ex) Are you meeting expectations?

△ **When to use it:** We use this whenever we start working on a stage of the customer experience, whether it's improving something that already exists or designing it from scratch. It's much easier to complete if you know the stages that have come before, so we usually complete the sheet **When does the experience start and end?** first.

★ **The benefit:** Great customer experiences set and then meet expectations, yet few businesses actually model what those expectations are. This worksheet will help you find the gaps and plug them. This is one of the most useful worksheets – we complete a copy for every stage of every experience we work on.

✓ **You've got it right when:** You are confident that you know how to meet or reset a customer's expectations for a stage of the customer experience.

AUTHOR: ....

DATE: ....

PROJECT: ....

CUSTOMER(S): ....

STAGE NAME: ....

1. Existing expectations
What expectations does the customer have when they arrive at this stage of the journey?

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2. Learnt behaviors
What relevant skills or learnt behaviors will the customer have already?

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3. Target expectations
What expectations should this stage of the journey set?

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4. Observations and ideas
What expectation issues are affecting the customer experience?
What could you do to better manage the customer's expectations?

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→ **What next?** To make life easier, we usually print a copy of the **Scratchpad** worksheet for each stage we're working on, and use it to collect the ideas from each of the other sheets in one place. We then use that as a checklist when we design the solution, so we don't have to leaf through loads of other pages. You might want to do the same, copying the ideas you come up with here onto the scratchpad.

methodical