



CRM Customer Journey Mapping Checklist 2026

Pre-Mapping Research & Audience Identification

Define your target customer segments, buyer personas, and the specific objectives of the mapping exercise.

Target Buyer Persona Description

Write something...

Customer Segments Involved

- ☐ B2B Enterprise
- ☐ B2B SMB
- ☐ B2C Individual
- ☐ Internal Stakeholders

Primary Mapping Objective

Write something...

Research Completion Date

Enter date...

Persona Documentation

 Upload File

Touchpoint Inventory & Channel Audit

Identify every interaction point between the customer and the brand across all digital and physical channels.

Primary Touchpoint Name

Write something...

Communication Channels Involved

- ☐ Email
- ☐ Social Media
- ☐ Direct Sales Call
- ☐ Website/Landing Page
- ☐ Mobile App
- ☐ Customer Support Chat

Touchpoint Ownership

- ☐ Marketing Team
- ☐ Sales Team
- ☐ Customer Success
- ☐ Product/Engineering

Channel Effectiveness Assessment

Write something...

Last Audit Performed

Enter date...

Lifecycle Stage Definition

Clearly outline the stages of the customer journey, from initial awareness and acquisition to retention and advocacy.

Stage Name

Write something...

Stage Definition & Criteria

Write something...

Stage Ownership

- ☐ Marketing
- ☐ Sales
- ☐ Customer Success
- ☐ Support

Associated Customer Goals

- ☐ Lead Generation
- ☐ Conversion
- ☐ Retention
- ☐ Upsell/Expansion
- ☐ Churn Prevention

Review Date

Enter date...

Customer Experience & Pain Point Analysis

Document the emotional highs and lows, friction points, and obstacles customers encounter during each stage.

Identified Friction Points

- ☐ Long response times
- ☐ Inconsistent communication
- ☐ Difficult navigation
- ☐ Lack of personalized content
- ☐ Complex checkout/signup process

Detailed Pain Point Description

Write something...

Customer Sentiment Intensity

- ☐ Critical/Frustrated
- ☐ Neutral/Passive
- ☐ Positive/Satisfied

Estimated Impact Score (1-10)

Enter a number...

Customer Feedback Evidence

 Upload File

CRM Data Integration & Automation Alignment

Ensure all identified touchpoints are trackable within the CRM and determine where automation can bridge gaps.

Integrated CRM Data Sources

- ☐ Email Marketing Platform
- ☐ Marketing Automation Tool
- ☐ Customer Support/Helpdesk
- ☐ Social Media Management Tool
- ☐ E-commerce/ERP System
- ☐ Web Analytics (Google Analytics 4)

Automation Workflow Trigger Name

Write something...

Automation Maturity Level

- ☐ Manual Processes
- ☐ Semi-Automated (Trigger-based)
- ☐ Fully Automated (AI-driven)

Data Sync Frequency Requirements

Write something...

Last Data Integration Audit Date

Enter date...

Estimated Sync Error Rate (%)

Enter a number...

Feedback Loop & Sentiment Integration

Establish methods for capturing real-time customer feedback (NPS, CSAT) and feeding it back into the journey map.

Feedback Channels to Monitor

- ☐ NPS Surveys
- ☐ CSAT Surveys
- ☐ Customer Interviews
- ☐ Social Media Mentions
- ☐ Support Tickets
- ☐ Email Feedback Loops

Feedback Frequency

- ☐ Real-time
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually

Sentiment Analysis Summary

Write something...

Last Review Date

Enter date...

Customer Feedback Report

 Upload File

Cross-Functional Stakeholder Review

Validate the journey map with Sales, Marketing, and Customer Success teams to ensure a unified view.

Departments Involved in Review

- ☐ Sales
- ☐ Marketing
- ☐ Customer Success
- ☐ Customer Support
- ☐ IT/Operations

Lead Reviewer Name

Write something...

Review Completion Date

Enter date...

Stakeholder Feedback & Discrepancies

Write something...

Review Outcome

- ☐ Approved
- ☐ Approved with Revisions
- ☐ Rejected - Requires Resubmission

Final Approval Signature

Implementation Roadmap & KPI Setting

Define actionable steps to improve the journey and establish measurable metrics to track success in 2026.

Primary Implementation Goal

Write something...

Actionable Improvement Steps

Write something...

Implementation Deadline

Enter date...

Target NPS Improvement Score

Enter a number...

Priority Level

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

Key Performance Indicators (KPIs) to Track

- ☐ Customer Retention Rate
- ☐ Customer Lifetime Value (CLV)
- ☐ Churn Rate
- ☐ Conversion Rate
- ☐ Average Response Time

Finalized Roadmap Document

 Upload File

Project Owner Approval

< Previous

> Next

✔ Finish

🔧 Generate Sample Report