



Insurance Customer Journey Mapping Audit Checklist 2026

Pre-Purchase & Prospecting Phase

Audit the initial touchpoints, including marketing accuracy, lead generation workflows, and the clarity of initial product information provided to potential policyholders.

Marketing Campaign Name

Write something...

Lead Source Category

- ☐ Organic Search
- ☐ Paid Advertising
- ☐ Social Media
- ☐ Referral/Agent
- ☐ Direct Mail

Analyzed Touchpoints

- ☐ Social Media Ads
- ☐ Landing Pages
- ☐ Email Marketing
- ☐ Search Engine Results
- ☐ Print/Physical Media

Initial Impression Assessment

Write something...

Audit Completion Date

Enter date...

Estimated Monthly Lead Volume

Enter a number...

Quote & Application Process

Review the efficiency of the quotation engine, the ease of the application form completion, and the seamlessness of the underwriting data collection steps.

Application Channel Used

- ☐ Mobile App
- ☐ Web Portal
- ☐ Direct Agent
- ☐ Email/Manual

Average Time to Complete Application (Minutes)

Enter a number...

Friction Points Identified

- ☐ Complex Form Fields
- ☐ Document Upload Issues
- ☐ Slow Loading Times
- ☐ Lack of Real-time Pricing
- ☐ Technical Errors/Bugs

Application Screenshot/Error Log Evidence

 Upload File

Detailed Observations on Quote Accuracy

Write something...

Audit Completion Date

Enter date...

Policy Issuance & Onboarding

Evaluate the speed of policy delivery, the clarity of policy documentation, and the effectiveness of the initial welcome communication and digital portal setup.

Policy Effective Date

Enter date...

Policy Type

- ☐ Auto
- ☐ Home
- ☐ Life
- ☐ Commercial
- ☐ Health

Onboarding Documents Verified

- ☐ Proof of Identity
- ☐ Signed Application Form
- ☐ Payment Confirmation
- ☐ Risk Assessment Report

Digital Policy Schedule Copy

 Upload File

Policyholder Contact Email

Write something...

Onboarding Discrepancy Notes

Write something...

Compliance Officer Verification

Policy Servicing & Management

Assess the ease of making policy changes (endorsements), premium payment processes, and the accessibility of self-service tools for existing customers.

Policyholder Name

Last Policy Review Date

Servicing Tasks Completed

- ☐ Premium Payment Processed
- ☐ Endorsement/Amendment Applied
- ☐ Address/Contact Info Updated
- ☐ Beneficiary Details Verified

Service Request Priority

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Urgent

Service Discrepancy Notes

Write something...

Updated Policy Endorsement Document

 Upload File

Auditor Verification Signature

Claims Experience & Communication

Audit the first notice of loss (FNOL) process, the transparency of claim status updates, and the user interface of the claims reporting interface.

Claim Notification Channel Used

- ☐ Mobile App
- ☐ Web Portal
- ☐ Phone Call
- ☐ Email
- ☐ Agent/Broker

Date of First Notice of Loss (FNOL)

Enter date...

Description of Incident/Loss

Write something...

Supporting Evidence (Photos/Documents)

 Upload File

Communication Touchpoints Completed

- ☐ Initial Acknowledgement Received
- ☐ Claim Investigator Assigned
- ☐ Status Update Sent
- ☐ Settlement Offer Presented

Estimated Loss Value

Enter a number...

Claims Auditor Verification

Renewal & Retention Workflow

Review the timeliness of renewal notices, the transparency of premium adjustments, and the effectiveness of retention strategies for expiring policies.

Renewal Notice Dispatch Date

Enter date...

Renewal Premium Adjustment Status

- ☐ No Change
- ☐ Increase
- ☐ Decrease
- ☐ Re-underwriting Required

Retention Strategy Implemented

- ☐ Loyalty Discount Applied
- ☐ Policy Bundle Offer Sent
- ☐ Personalized Agent Outreach
- ☐ Automated Email Sequence

Customer Retention Risk Level

Write something...

Detailed Renewal Observations

Write something...

Revised Quote Document

 Upload File

Auditor Verification

Omnichannel Consistency Audit

Ensure a unified brand experience and data continuity across mobile apps, web portals, email, and direct human interactions (call centers/agents).

Active Customer Channels

- ☐ Mobile App
- ☐ Web Portal
- ☐ Email
- ☐ Telephone/Call Center
- ☐ Direct Mail
- ☐ Social Media/Chatbots

Brand Messaging Alignment Score

- ☐ Fully Consistent
- ☐ Minor Discrepancies Noted
- ☐ Significant Inconsistencies
- ☐ Critical Brand Mismatch

Discrepancy Details

Write something...

Channel Comparison Screenshots

 Upload File

Data Sync Latency (Minutes)

Enter a number...

Post-Interaction Feedback & Sentiment

Analyze the implementation of NPS (Net Promoter Score) surveys, customer feedback loops, and the process for resolving customer grievances.

Net Promoter Score (NPS) Captured

Enter a number...

Primary Customer Feedback Channel

- ☐ Email Survey
- ☐ In-App Prompt
- ☐ Phone Call
- ☐ SMS/Text

Identified Pain Points in Feedback

- ☐ Slow Response Time
- ☐ Unclear Communication
- ☐ Technical/Digital Friction
- ☐ Pricing/Premium Discrepancies
- ☐ Staff Professionalism

Detailed Sentiment Analysis Summary

Write something...

Date of Feedback Collection

Enter date...

Customer Transcript or Screenshot Attachment

 Upload File

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✓ Finish

 Generate Sample Report