



WCFIX Customer Experience Strategy Workbook

A practical workbook for school districts and service organizations

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Build a strategy your team can carry out

Use this workbook to examine one important service journey, agree on the experience people should receive, test a feasible improvement and review what happened. Start with a real problem and the people who experience it. Finish with a named owner, usable evidence and a decision about the next cycle.

The work follows the WCFIX practices of Audit and Diagnostic, Vision Design, and Action and Evolution. The companion guide supports collaborative review throughout the process.

Included in this product

- [] Eleven reusable planning and review worksheets plus a strategy summary.
- [] A practical eight-pillar diagnostic and guidance for setting priorities.
- [] A 90-day implementation schedule and a method for examining cost and value.
- [] Illustrative school and business cases with clearly labeled assumptions.
- [] A companion practice checklist, five-criterion rubric and review record.
- [] AI assistance prompts with human review responsibilities.

The book *Leading Schools That Work* is a separate resource. Coaching, live facilitation, software access and certification are not included in this workbook.

Developed for WCFIX. This product is not issued, licensed or endorsed by UC Irvine, another university or a research firm.



Phase 1

Audit and Diagnostic



A useful diagnosis describes a specific gap between what people need and what the service currently delivers. Check the process at the point of use. A leader's explanation is one source of evidence; it is not a substitute for the experience of the people involved.

Facilitate the audit

Begin with a five-minute individual reflection. Ask participants to describe one recent interaction, then separate direct observations from interpretations. Collect records and invite people who experienced the service to correct the team's assumptions. Examine handoffs and exceptions before deciding what to fix.

Practice checklist

- ☐ Name the journey, the people served and the start and end points.
- ☐ Include frontline staff and people whose access needs are easily overlooked.
- ☐ Compare a service record with feedback or direct observation.
- ☐ Write the evidence source, collection date and limitations.
- ☐ Distinguish symptoms, possible causes and tested causes.
- ☐ Review urgent risk independently of the maturity rating.

Decision before moving on

Agree on one priority and one question that still needs evidence. If the team cannot describe who experiences the problem, how often it occurs or where it occurs, collect more information before selecting a solution.

Our evidence-backed problem statement

The assumption we will test next

Book connection: Chapter 4, Diagnosis Before Prescription; Chapter 15, The Cost of Silos; Chapter 48, The CX Maturity Check.

Set the engagement brief

Complete this page together. Keep the scope small enough for a named team to influence within 90 days.
Describe a service outcome rather than a preferred technology or vendor.

Organization or team and date

Journey and people served

Start point and finish point

Current problem and evidence reference

Decision we need to make at the end of the cycle

Sponsor and process owner

Authority and resources available

Access needs and people who must be consulted

Outside our scope: _____

Important dependency or obligation: _____

Next evidence review date: _____