

CUSTOMER EXPERIENCE SKILLS SELF-ASSESSMENT CHECKLIST

Assess your strengths, identify skill
gaps, and plan your next step in CX

**A practical, reusable checklist for CX professionals and aspiring
leaders**

1. Introduction

1.1 Purpose of the self-assessment checklist

This checklist helps you evaluate your current customer experience (CX) skills, recognise where you perform confidently, and identify capabilities that need focused practice. It turns “How strong are my CX skills?” into a practical development plan with measurable actions.

Treat your ratings as a snapshot of your current ability, not a formal certification or comparison with others. Where possible, use recent examples, customer feedback, performance data, or feedback from a manager or colleague to support your ratings.

1.2 Who should use this checklist

Customer service and support professionals strengthening day-to-day interactions.

CX specialists, analysts, journey-mapping practitioners, and customer success professionals.

Team leads and managers responsible for service quality, coaching, and improvement.

Professionals preparing for a move into CX strategy, operations, analytics, or leadership.

Learners and career changers identifying skills to practise and demonstrate.

1.3 How to use the checklist

Rate each skill using the five-point scale.

Think about what you can demonstrate consistently, not just what you know in theory.

Add examples or evidence for ratings important to your role or career goals.

Calculate your skill-area and overall scores, then identify strengths and gaps.

Choose three skills to improve and create specific activities with deadlines.

Repeat the assessment after 8–12 weeks to review progress.

Tip: If you have had little opportunity to use a skill, note that limitation. Lack of opportunity is not necessarily lack of ability.

2. Customer Experience Skills Self-Assessment

Rate every statement from 1 to 5. Use the evidence column for a real example, result, customer comment, metric, or feedback that supports your rating.

Rating scale

Rating	Level	What it means
1	Needs improvement	I need guidance and practice to perform this skill reliably.
2	Developing	I can handle basic situations but need support with complex cases.
3	Competent	I can apply this skill independently in typical situations.
4	Proficient	I apply this skill consistently, including in challenging situations.

5	Expert	I handle complex situations and can help others develop the skill.
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2.1 Customer Service Skills

Skill statement	Rating (circle one)	Evidence / example
Active listening	1 2 3 4 5	
Clear written and verbal communication	1 2 3 4 5	
Patience and problem-solving	1 2 3 4 5	
Product knowledge and ownership	1 2 3 4 5	

Area total: ____ / 20 Average rating: ____ / 5 Notes: _____

2.2 Empathy

Skill statement	Rating (circle one)	Evidence / example
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Understanding customer emotions	1 2 3 4 5	
Responding to customer concerns appropriately	1 2 3 4 5	
Asking thoughtful questions	1 2 3 4 5	
Following up after resolving issues	1 2 3 4 5	

Area total: ____ / 20 Average rating: ____ / 5 Notes: _____

2.3 Data and Feedback Analysis

Skill statement	Rating (circle one)	Evidence / example
Understanding NPS, CSAT, and CES	1 2 3 4 5	
Identifying patterns in customer feedback	1 2 3 4 5	

Analysing complaints and recurring issues	1 2 3 4 5	
Turning insights into actionable improvements	1 2 3 4 5	

Area total: ____ / 20 Average rating: ____ / 5 Notes: _____

2.4 Customer Journey Mapping and Problem-Solving

Skill statement	Rating (circle one)	Evidence / example
Mapping customer touchpoints	1 2 3 4 5	
Identifying friction points	1 2 3 4 5	
Finding root causes of problems	1 2 3 4 5	
Recommending improvements	1 2 3 4 5	

Area total: ____ / 20 Average rating: ____ / 5 Notes: _____

2.5 AI and Digital Fluency

Skill statement	Rating (circle one)	Evidence / example
Understanding AI-powered customer service tools	1 2 3 4 5	
Evaluating chatbot responses	1 2 3 4 5	
Recognising when human intervention is needed	1 2 3 4 5	
Understanding customer data privacy	1 2 3 4 5	

Area total: ____ / 20 Average rating: ____ / 5 Notes: _____

2.6 Cross-Team Collaboration

Skill statement	Rating (circle one)	Evidence / example
Communicating customer issues clearly	1 2 3 4 5	

Working with other departments	1 2 3 4 5	
Presenting evidence to support recommendations	1 2 3 4 5	
Following up on improvement initiatives	1 2 3 4 5	

Area total: ____ / 20 Average rating: ____ / 5 Notes: _____

2.7 Business Thinking

Skill statement	Rating (circle one)	Evidence / example
Understanding churn and retention	1 2 3 4 5	
Recognising cost-to-serve factors	1 2 3 4 5	
Connecting CX improvements to business outcomes	1 2 3 4 5	

Estimating the impact of proposed solutions	1 2 3 4 5	
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Area total: ____ / 20 Average rating: ____ / 5 Notes: _____

2.8 Leadership and Change Management

Skill statement	Rating (circle one)	Evidence / example
Coaching and supporting team members	1 2 3 4 5	
Prioritising customer experience improvements	1 2 3 4 5	
Managing process changes	1 2 3 4 5	
Communicating results to stakeholders	1 2 3 4 5	

Area total: ____ / 20 Average rating: ____ / 5 Notes: _____

3. Calculate Your CX Skills Score

3.1 Record your rating for each skill

Transfer the four ratings from each area into this summary. Each area contains four skills; the total ranges from 4 to 20 and the average from 1.0 to 5.0.

Skill area	Total score	Average	Priority / notes
1 Customer Service Skills	___ / 20	___ / 5	
2 Empathy	___ / 20	___ / 5	
3 Data and Feedback Analysis	___ / 20	___ / 5	
4 Customer Journey Mapping and Problem-Solving	___ / 20	___ / 5	
5 AI and Digital Fluency	___ / 20	___ / 5	

6 Cross-Team Collaboration	___ / 20	___ / 5	
7 Business Thinking	___ / 20	___ / 5	
8 Leadership and Change Management	___ / 20	___ / 5	

3.2 Calculate your overall score

There are 32 statements. Add all ratings for a total from 32 to 160, then divide by 32 for the overall average out of 5.

Calculation	Your result
Sum of all 32 ratings	_____ / 160
Overall average = total ÷ 32	_____ / 5
Number of skills rated 1 or 2	_____
Number of skills rated 4 or 5	_____

Example: a total of 112 gives an average of $112 \div 32 = 3.5$ out of 5. This is a self-reflection aid, not a validated psychometric score.

3.3 Identify your strongest skills

Choose up to three skills with your highest ratings. Use evidence to check that these are demonstrated strengths, not only areas you enjoy.

Strong skill	Rating	Evidence / result	How I can use this strength
1.			
2.			
3.			

3.4 Highlight your biggest skill gaps

Choose up to three skills with low ratings or high importance to your next role. A low rating is a starting point for practice, not a judgement about your potential.

Skill gap	Rating	Why it matters	First step to improve
1.			
2.			

3.			
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4. Understand Your Results

4.1 Skills that are strengths

Ratings of 4 or 5 may indicate strengths you can use more deliberately. Look for evidence such as positive customer feedback, fewer repeat contacts, clearer handoffs, useful analysis, or improvements adopted by other teams. Consider sharing your approach or taking on a stretch assignment.

4.2 Skills that need improvement

Ratings of 1 or 2 point to areas where structured practice, feedback, or training may help. Start with a repeatable activity: practise summarising customer concerns before responding, review feedback weekly, or map one customer journey from start to finish.

4.3 Skills to prioritise based on your current role

Role focus	Skills to consider prioritising	Example evidence
Customer support / service	Listening, communication, empathy, product knowledge, ownership	Quality reviews, customer comments, resolution and repeat-contact patterns

CX analyst / insights	NPS, CSAT, CES, feedback analysis, root-cause analysis, business thinking	Insight reports, trend analysis, recommendations adopted
Journey / service design	Journey mapping, friction analysis, problem-solving, collaboration	Journey maps, validated pain points, tested improvements
Digital CX / AI-enabled service	AI tools, chatbot evaluation, escalation judgement, privacy	Test cases, quality findings, safer handoffs
CX team lead / manager	Coaching, prioritisation, change management, stakeholder communication	Coaching plans, milestones, measurable service improvements

4.4 Skills to develop for your next career step

Compare your ratings with the responsibilities of a role you want to pursue. Identify two or three skills that recur in job descriptions, then choose practical work that demonstrates them. A portfolio example, improvement report, journey map, or documented analysis can show progress.

Target role / career step	Skills required	Current rating	Evidence to build
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5. Create Your Personal CX Development Plan

5.1 Choose three skills to improve

Select three skills based on your assessment, current responsibilities, and career direction. Focused practice makes progress easier to observe than trying to improve everything at once.

5.2 Set specific learning goals

Write goals that describe an observable action and outcome. Instead of “get better at feedback analysis,” try “analyse 30 anonymised comments each week for four weeks, group recurring themes, and present three evidence-based recommendations.”

5.3 Identify practical activities to build each skill

Possible activities include role-play, shadowing an experienced colleague, reviewing anonymised feedback, mapping a customer journey, testing a chatbot, practising a stakeholder presentation, or asking for structured feedback.

5.4 Set deadlines and track progress

Skill to improve	Specific goal	Practice activity / support	Measure of success	Deadline	Status

1.					Not started
2.					Not started
3.					Not started

Progress check-in: What did I practise? What evidence did I collect? What feedback did I receive? What will I change next?

Check-in date	Action completed	Evidence / feedback	Adjustment / next action
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6. Practical Action Plan

Use these activities to turn self-assessment into hands-on experience. Follow your organisation's privacy, security, and customer-contact policies.

6.1 Improve customer service through real customer interactions

Choose suitable interactions, following internal rules and required consent or supervision.

Practise active listening by summarising the issue and confirming understanding before offering a solution.

Review whether your response was clear, empathetic, accurate, and complete.

Ask a manager or peer for feedback and note one behaviour to repeat and one to improve.

Interaction / scenario	Skill practised	Feedback received	Next improvement

6.2 Practise analysing customer feedback

Use anonymised survey comments, support tickets, or fictional sample data.

Tag comments by theme, such as effort, wait time, product confusion, delivery, or resolution.

Look for recurring patterns and separate evidence from assumptions.

Write three findings and recommend one action for each.

Feedback theme	Evidence / example	Root cause to investigate	Recommended action
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6.3 Create a sample customer journey map

Choose a journey such as discovering a product, placing an order, getting support, or requesting a return. Record stages, customer goals, touchpoints, emotions, friction points, and improvement ideas. Validate assumptions with evidence where possible.

Journey stage	Customer goal	Touchpoint	Pain point / emotion	Evidence	Improvement idea
Discover					
Evaluate					
Purchase / sign-up					

Use / receive service					
Support / resolve issue					

6.4 Evaluate an AI chatbot or customer service workflow

Choose an approved chatbot or public demo that does not require real customer data.

Write five test prompts: common, ambiguous, incomplete, out-of-scope, and requiring human help.

Compare each response with expected behaviour or a trusted reference.

Record accuracy, relevance, clarity, privacy considerations, and whether escalation is appropriate.

Summarise the most important finding and one improvement recommendation.

Test prompt / scenario	Expected behaviour	Observed response	Finding / recommended action
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Common question			
Ambiguous question			
Incomplete request			
Out-of-scope request			
Human intervention needed			

6.5 Document your progress and achievements

Keep a record of the work completed, evidence collected, results, and lessons learned.

Use measurable outcomes where available, but do not claim an action caused a business result unless the evidence supports it.

Date	Activity / contribution	Evidence or result	Skill demonstrated	Next step
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7. Final Review Checklist

- ☐ I have rated all eight skill areas and all 32 skill statements.
- ☐ I have calculated each area score and my overall average.
- ☐ I have identified my strongest skills and evidence supporting them.
- ☐ I have identified my top three skill gaps.
- ☐ I have considered skills important to my current role and next career step.
- ☐ I have written specific goals and practical activities.
- ☐ I have set deadlines and measures of progress.
- ☐ I have chosen a date to repeat this assessment.

My reassessment date: _____ Person I can ask for feedback:

Next Steps: Build Your CX Career

Use your results to choose one practical improvement project, one skill to practise weekly, and one person who can give useful feedback. Revisit your scores after 8–12 weeks and compare new ratings with the evidence collected.

Build proof of your skills: keep a journey map, feedback analysis, chatbot evaluation, or improvement proposal.

Seek feedback: ask a manager, mentor, or colleague to review a specific example.

Connect skills to outcomes: explain how a recommendation could reduce customer effort, improve resolution, strengthen retention, or make service more accessible.

Keep learning: choose resources that address your actual gaps and apply the learning to a practical task.

Final reflection: The most important CX skill I will strengthen next is _____, because _____. My first action is _____ by _____.

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