Gap analysis template

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Use the template to conduct a gap analysis to identify the customer journey gaps in your organization.
- We have provided an example of how to use this template to 'improve the pre-sales hand-off process'.
- You can insert your own customer journey objectives on which to conduct a gap analysis in the rows below.
- We have also provided some common customer journey objectives at the bottom of the template which you are welcome to use as you s

	Current state	Desired state	Gap description	Actions
Example: Improve the pre-sales handoff process	- Pre-sales process identifies customer goals, priorities, and objectives. - Lack of structured handoff to implementation and customer success teams. - Information collected in pre-sales may not be effectively communicated or utilized in subsequent stages.	- Seamless transfer of customer goals, priorities, and objectives from pre-sales to implementation and customer success teams. - Clear understanding of customer expectations and desired outcomes across all teams involved. - Proactive alignment of strategies and efforts to meet customer needs and objectives	- Disconnect between pre-sales activities and post-sales operations. - Risk of misalignment between customer expectations and service delivery. - Potential for duplicated efforts or overlooked customer requirements. - Reduced effectiveness of customer success initiatives due to insufficient information transfer.	- Establish a standardized process for pre-sales handoff to implementation, with clearly defined roles and responsibilities at each stage. - Develop templates or checklists to capture key customer goals, priorities and objectives during pre-sales engagements. Provide training and education sessions for all involved teams. - Establish feedback loops to gather insights from CS teams regarding relevance and effectiveness of pre-sales handoff information. Use the feedback to continuously refine the process and improve alignment between customer expectations and service delivery. - Regularly review and update the process
[Insert Objective #1]				
[Insert Objective #2]				
[Insert Objective #3]				
[Insert Objective #4]				
Improve the onboarding process				
Align customer expectations with actual service				
Improve customer communication				
Increase personalized engagement				
Reduce service silos / increase internal collaboration				
Improve feedback loops				
Be more proactive in customer support				

Optimize touchpoints			
Optimize metrics			
Eliminate post-purchase neglect			