SAMPLE RESULTS · WORKED EXAMPLE

Customer Journey Scorecard

Where are Brightwater's customers getting stuck, and what is it costing? Seven stages, 28 statements, seven minutes.

MEET BRIGHTWATER FABRICATIONS

A fictional sheet-metal fabricator that sells to other businesses on 30–60 day terms. It's profitable and busy, and the owner wants to grow. We use it in our Levers for Growth guide and as the example in every Castle FD tool.

Annual sales	£4,000,000
Gross margin	40%
Overheads	£1,200,000
Operating profit	£400,000
Debtor / stock / creditor days	60 / 45 / 40
Cash in the bank	£250,000

What Brightwater answered

Business type: manufacturing and packaging. Turnover £3m–£5m, gross margin 40%. Then 28 statements written for manufacturers, four for each of the seven stages, answered Yes, Partly, No or Not sure.

68 / 100
"Solid in places, leaking in others"

£145k
profit potential a year, estimated from its answers

£65k
one-off cash release, estimated

Its journey heatmap

Stage	Customer	Conversion	Operations	Technology	Money
Awareness	2.0	2.0	Needs inside view	1.0	3.0
Research	3.0	2.0	2.0	3.0	Needs inside view
Evaluation	Needs inside view	3.0	3.0	Needs inside view	2.5
Purchase	Needs inside view	Needs inside view	1.0	Needs inside view	1.7
Delivery	Needs inside view	Needs inside view	3.0	3.0	2.5
Retention	1.0	1.0	2.0	Needs inside view	1.0
Advocacy	1.0	2.0	Needs inside view	1.0	2.0

Each cell is the average score out of 3 for that stage and lens. Grey cells can't be judged from a self-assessment. They're what a conversation with Castle FD fills in.

Brightwater Fabrications is a fictional business. Figures are illustrative and were produced by the free tool from the answers shown. Not financial advice: individual circumstances vary. The £ estimates use the midpoint of the turnover band.

Its three weakest stages

1. **Retention.** Customers aren't staying or buying more as much as they could: no account manager, no regular review, no demand forecasting with key accounts.
2. **Purchase.** Friction at the point of saying yes: slow quotes, no indexation on long contracts.
3. **Advocacy.** Happy customers aren't being turned into reviews, referrals and new leads.

Where it was strong

Evaluation was its strongest stage: it knows its true product cost before it quotes, shows case studies from the buyer's industry and tracks quote-to-order conversion. Delivery scored well too: it measures on-time-in-full and invoices on the day goods are despatched.

Every 1% on its prices is worth about £40,000 of profit a year.

Its top 5 fixes

#	Statement	Fix
1	Purchase · Money Prices reviewed at least annually, with material and energy cost clauses.	Add an indexation clause and diarise an annual price review.
2	Purchase · Operations Quotes sent within two working days of a complete enquiry.	Create quote templates and set a two-day turnaround target.
3	Awareness · Technology We know where our enquiries come from.	Record the source of every enquiry for three months.
4	Advocacy · Customer Recent testimonials we can share with prospects.	Collect three short testimonials with permission to use them.
5	Advocacy · Technology We share projects on LinkedIn and our website.	Post one customer project or product update each month.

What Brightwater did next

It named an account manager for its 20 largest customers, with a quarterly review call, and added an indexation clause to every contract over six months. It also asked Castle FD for the outside-in review, which fills in the grey cells using its public accounts and website.

TRY IT ON YOUR OWN NUMBERS

Take the Customer Journey Scorecard

castlefd.com/customer-journey-scorecard

Brightwater Fabrications is a fictional business. Figures are illustrative and were produced by the free tool from the answers shown. Not financial advice: individual circumstances vary. The £ estimates use the midpoint of the turnover band.