

Synergistic CX

The Customer Experience Magazine

TURNING INSIGHTS
INTO ACTION WITH
**JASON
BARE**

1

What Drives a Perfect Car Wash
**Decoding Data on Service
Quality and Execution**

2

Expert Perspectives in Action
**Practical CX Strategies
by Industry Leaders**

3

From Routine to Preference
**Why Getting It Right
Every Time Matters**

January 2026

Experience by Design

Customer Experience Shaped by Consistency and Precision

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MESSAGE FROM THE EDITOR

As we begin 2026, we also mark the start of the third year of the CX Channel. What began as a focused knowledge initiative has evolved into a platform for evidence-based insight, critical thinking, and practical leadership dialogue on customer experience. Entering this third year is not simply a milestone; it is a renewed commitment to focus on what truly drives impact.

Customer experience is no longer a secondary ambition or support function for businesses. It has become one of the most decisive levers for sustainable growth, built through collective accountability – where leadership choices, operational execution, and frontline behaviors align around the customer.

The leaders who outperform are those who prioritize initiatives with real business relevance: grounded in operational reality, aligned with strategy, and executed consistently. CX does not create value through volume of activity, but through clarity, precision, and disciplined execution.

This month's edition reflects that principle clearly. Our guest expert, Jason Bare, President of BARE International, brings a pragmatic perspective shaped by decades of global experience. While our featured study focuses on car wash services, the learnings extend far beyond a single industry. Three principles stand out as universally relevant: understanding customer expectations with precision, intentional experience design, and consistency across touchpoints.

Throughout this edition, we return to a central idea: customer experience delivers value only when it is designed deliberately, measured intelligently, and managed as a core business discipline. The patterns are consistent – and so are the consequences of neglect.

The CX Channel is strengthened by dialogue, challenge, and the collective intelligence of its community. We invite you to be a part of that: by engaging with ideas, questioning assumptions, and contributing your own insight. Join us and help shape the discussions that matter most to leaders driving meaningful, sustainable results.

Cristiani Oliveira
Issue Editor
Synergistic CX Magazine
Together with the CX Channel Team

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PREVIOUSLY ON SYNERGISTIC CX

Our special Christmas edition reflected on a year of change in customer experience, bringing together insights from all Synergistic CX editions published throughout the year. The issue highlights recurring themes such as data-driven decisions, customer journey consistency, and the evolving balance between technology and human-centered CX design. Through expert perspectives and cross-industry learnings, it offers a forward-looking view of what lies ahead for CX leaders: sharper focus, smarter use of insight, and a more integrated experience strategy.



KEY TAKEAWAYS FROM JILL SPENCER

PURPOSE-DRIVEN CX: FROM OBJECTIVES TO BUSINESS RESULTS

Jill Spencer stresses that CX success starts with clear objectives and disciplined action. When organizations define their goals – revenue growth, cost reduction, or experience consistency – CX insights drive focused decisions, operational change, and measurable ROI.

CONNECTING THE EXPERIENCE DOTS: BUILDING A COMPLETE CX VIEW

Jill emphasizes that no single metric tells the full CX story. By combining mystery shopping, customer feedback, employee input, and performance data, organizations gain a holistic view of experience drivers, uncover hidden gaps, and strengthen confidence in decision-making.

TRUSTED PARTNERSHIP: THE FOUNDATION FOR SUSTAINABLE PROGRESS

Jill emphasizes that meaningful CX transformation is shaped by trusted advisory relationships, not technology alone. When partners act as strategic advisors and technology is used as an enabler, organizations can build purposeful, sustainable experience improvement grounded in trust and clarity.



Jill Spencer, Director of Business Intelligence at Proinsight



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PODCAST REACTIONS FROM THE CX CHANNEL TEAM

In the last episode of the Synergistic CX podcast, , Jill Spencer shared a grounded and experience-led perspective on what truly drives customer experience impact. Drawing on real client examples, she highlighted how combining different data sources creates clarity and reveals causality, enabling organizations to move beyond isolated metrics. Jill also emphasized the importance of clear objectives and trusted advisor relationships in turning insight into action – cutting through technology noise and anchoring CX programs in measurable business value.

EMIL TSANKOV



"Jill's perspective reinforces that technology and AI are only as effective as the intent guiding them. Without clear goals and strong alignment, data remains fragmented and insights underused. The message is clear: mature CX organizations are those that design systems capable of turning insight into execution, consistently and at scale."

CEO & Co-founder
Research Metrics

CRISTIANI OLIVEIRA



"Jill's contribution brings us back to the core of what customer experience is really about. What resonated most with me was her insistence on clarity of objectives and the importance of trusted client partnerships. It was a powerful reminder that CX is not a set of tools, but a long-term commitment to meaningful, measurable action."

CX Strategy Ambassador
Research Metrics

ERIK BROOKS



"Goals – the key takeaway from Jill's insight. Rather than CX being managed with isolated initiatives, Jill emphasized the shift towards an integrated operating model. This is a perfect fit for the Synergistic CX framework. By connecting customer insight, internal data, and AI with clear accountability, organizations can truly move from analysis to action."

Vice President
Research Metrics

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The background image shows a modern building with a blue and orange facade. The sky is blue with white clouds. A semi-transparent blue rectangle is overlaid on the image, containing the text.

INDUSTRY SPOTLIGHT:

Experience by Design

Customer Experience
Shaped by Consistency
and Precision



INTRODUCTION

The car wash sector is no longer defined solely by convenience and speed; it has become a high-frequency service experience where consistency, reliability, and attention to detail increasingly shape customer perceptions. What was once a transactional visit is now evaluated through a broader experience lens, where customers notice not only the result, but also how smoothly the service is delivered and how consistently it meets expectations.

Rising customer standards are reshaping the industry. Today's drivers expect predictable wash quality and timing, adequate pricing, and efficient service flows. Digital discovery, online reviews, and ratings now play a decisive role in choice, making every experience visible beyond the physical site. A single missed expectation can quickly influence reputation, while consistent delivery reinforces it.

In response, many operators are investing in automation, express formats, subscription models, and digital touchpoints to increase throughput and convenience. While these advances offer clear efficiency gains, they also introduce new pressures. Inconsistent wash outcomes, unclear value perception, or slow service can undermine the benefits of scale and technology, turning operational efficiency into a customer experience risk.

At the same time, these pressures create meaningful opportunity. Car wash brands that master execution fundamentals can transform everyday visits into dependable experiences customers rely on. In a market driven by repetition, loyalty is earned through consistency. By treating each visit as an opportunity to nurture retention and advocacy, operators can differentiate not through novelty, but through the confidence that comes from getting the basics right - every time.

This edition's objectives are designed to uncover actionable insights and drive measurable improvements in the car wash customer experience. The focus is on identifying the moments, behaviors, and operational practices that most strongly influence satisfaction, repeat visits, and long-term loyalty. In this edition we will seek to:

- **Understand Digital Influence:** Examine how online reviews and ratings, and customer comments shape brand perception, influence location choice, and impact trust in a highly competitive and convenience-driven market.
- **Evaluate Service Engagement:** Identify the touchpoints that matter most – from arrival and staff interaction to wash execution and issue handling – and assess how these moments affect overall experience and return intent.
- **Optimize the Marketing Mix:** Analyze the 7Ps through a car wash lens: wash quality and service formats, pricing alignment and value perception, location conditions, promotions and memberships, frontline staff performance, process efficiency, and service consistency.
- **Enhance the Customer Journey:** Map each journey stage – from awareness and consideration through conversion, retention, and advocacy – to uncover friction points, strengthen execution, and improve experience continuity across visits.
- **Unlock Growth Opportunities:** Explore how operational discipline, feedback responsiveness, subscription models, and experience-led differentiation can transform everyday services into reliable, loyalty-building customer relationships.

INDUSTRY STUDY SAMPLE

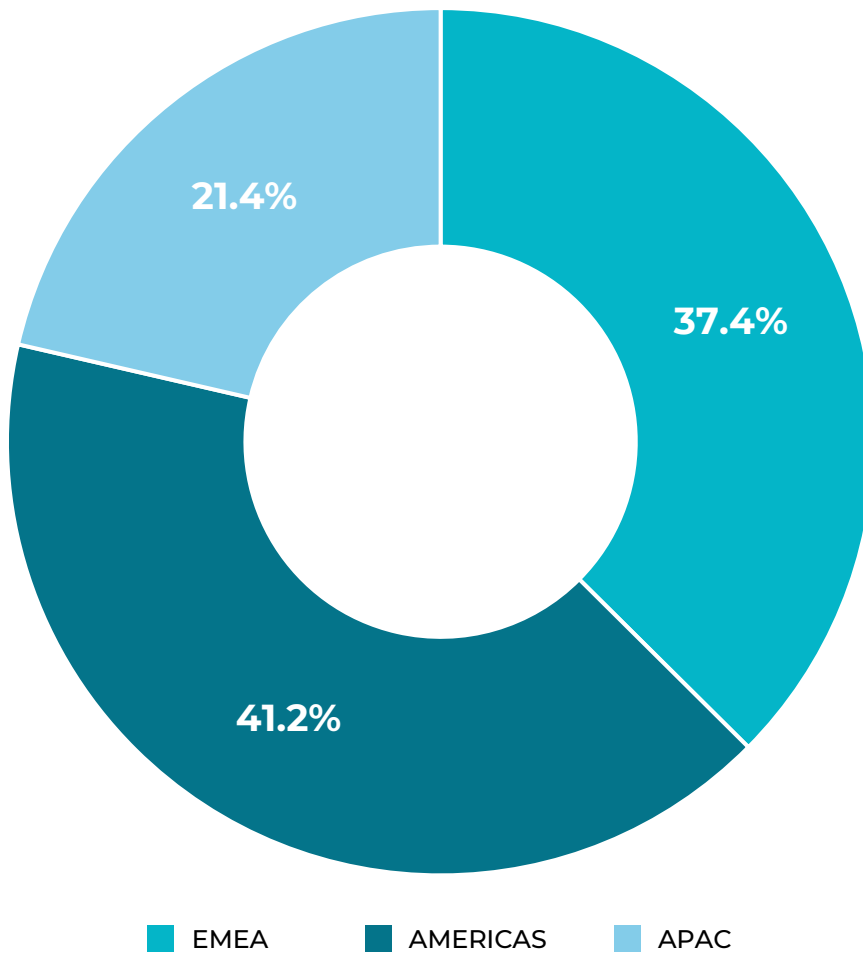
The sample reflects the selected **car wash locations included in the study**, defined by the following key parameters:

- Number of Places **1421**
- Confidence Level **99.50%**
- Margin of Error **2.50%**
- Number of Reviews **28,052**

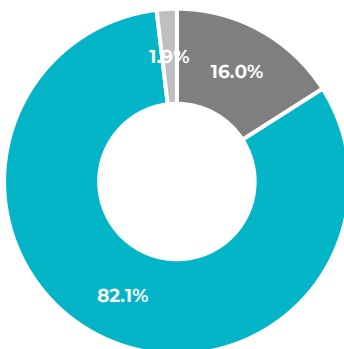
Our sample’s worldwide geographic structure is separated into three primary zones: the Americas, APAC (Asia-Pacific), and EMEA (Europe, the Middle East, and Africa). Each zone is further broken down into specific regions.

The distribution reveals a **well-balanced global sample footprint**, with the Americas leading at 41.23%, EMEA closely aligned at 37.4%, and APAC contributing 21.4%, creating a diversified and evenly represented regional mix.

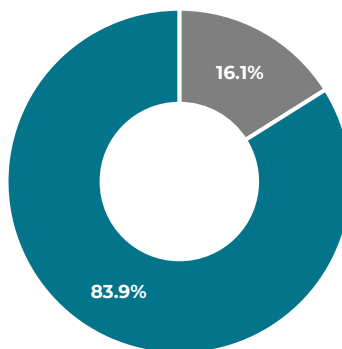
GLOBAL



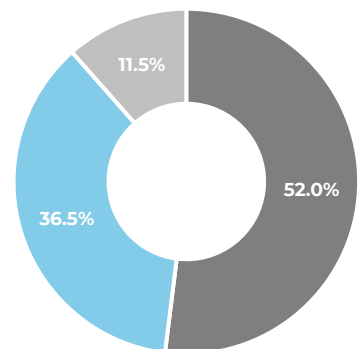
EMEA



AMERICAS



APAC



STAR RATINGS

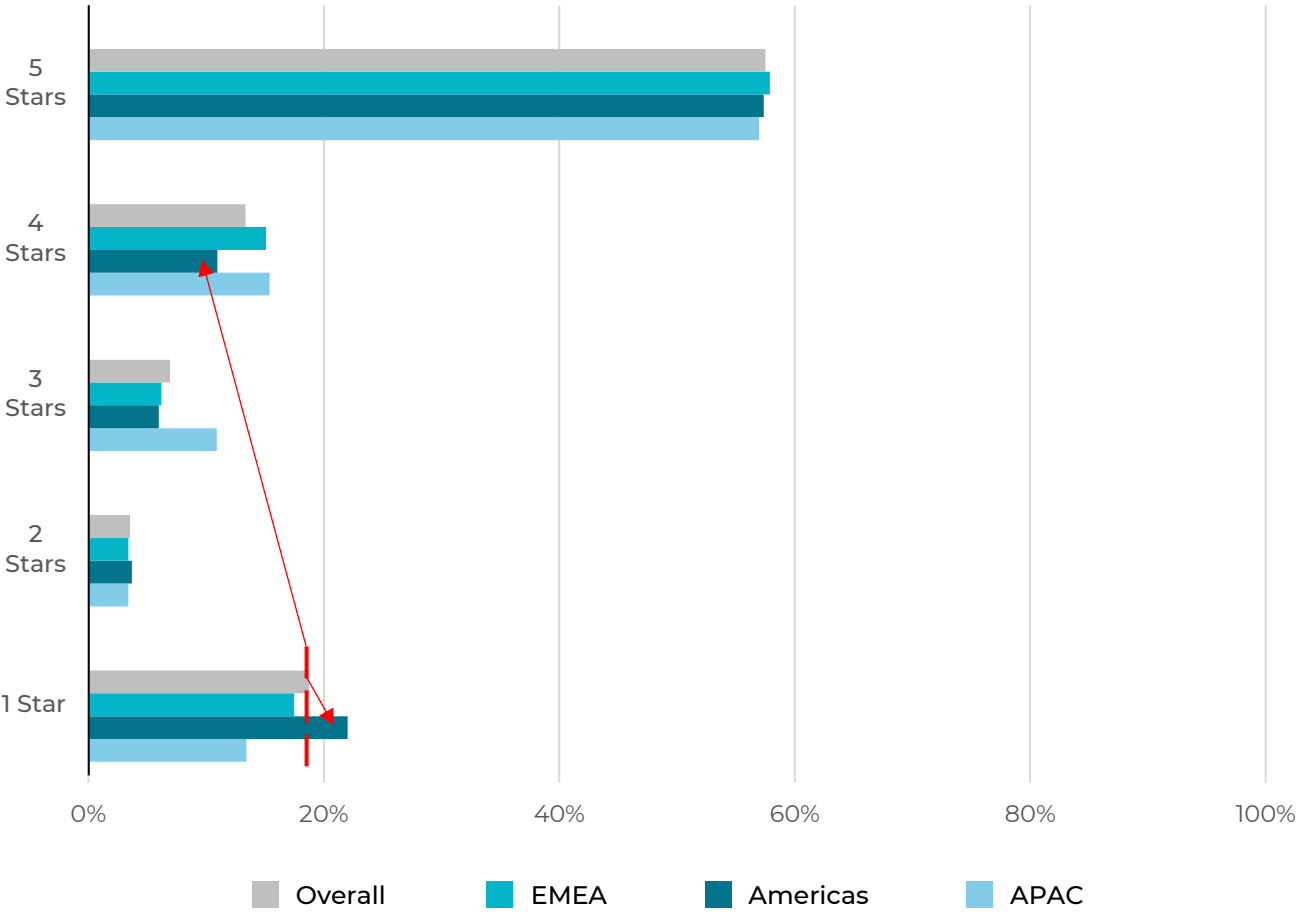
The star-rating distribution for **car wash** services reflects a broadly balanced satisfaction profile, with **five-star reviews clearly dominating**, at over half of all feedback.

At the same time, **dissatisfied customers remain a very meaningful segment**, as one- and two-star ratings together exceed 20%, signaling clear and recurring service breakdowns rather than isolated negative experiences.

Regional average ratings are closely aligned, showing minimal variation across markets. APAC records a slight lead at 3.99, followed by EMEA at 3.93 and the Americas at 3.78, all clustering near the global average of 3.87 and pointing to a largely consistent customer experience worldwide

"Star ratings" in online reviews and ratings are a system that allows customers to evaluate a product, service, or business on a scale, typically from one to five stars. Each star represents a level of satisfaction, with one star being the lowest (very dissatisfied) and five stars being the highest (very satisfied).

STAR RATINGS DISTRIBUTION



AVERAGE STAR RATING



CRITICAL REVIEW RESPONSE TIME (CRRT)

Critical Review Response Time results reveal a clear gap across the car wash industry. **Globally**, nearly **two-thirds (63.3%)** of critical **reviews remain** unanswered, indicating limited recovery efforts at moments of high customer dissatisfaction.

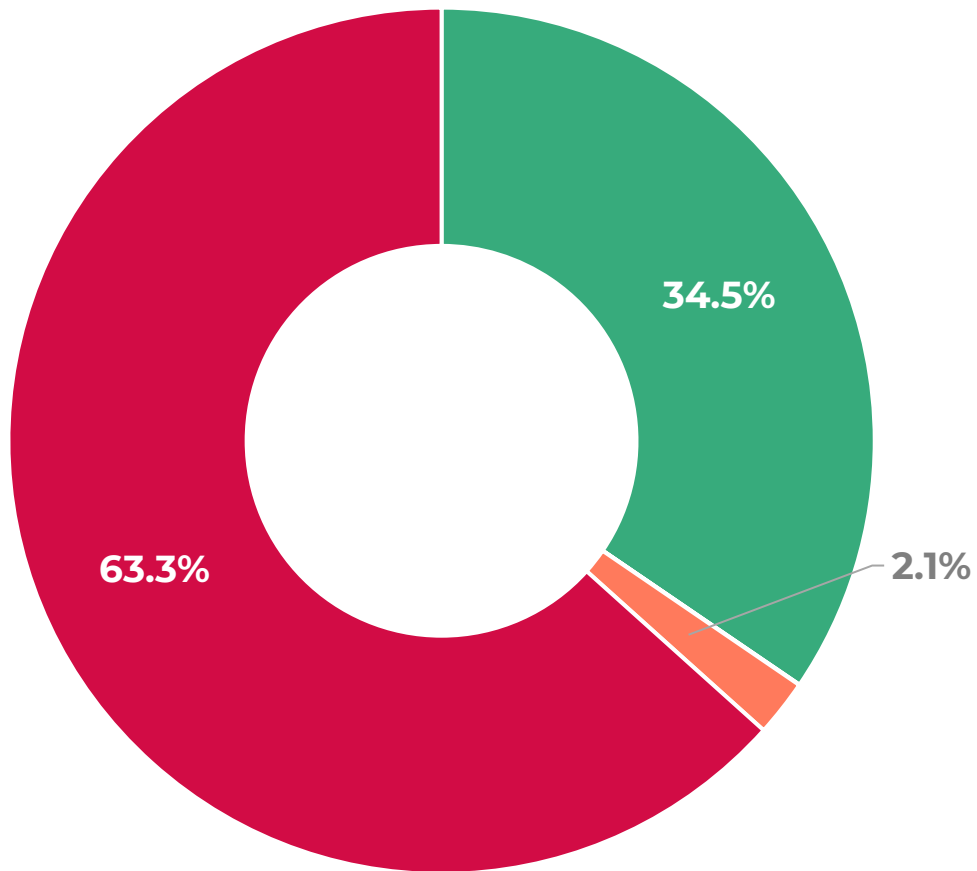
This pattern is consistent across regions, with **APAC** showing the **highest share of unanswered critical cases (80.3%)**, while the **Americas perform relatively better** but still **leave more than half (56.6%) without engagement** – highlighting response timeliness as a key CX improvement area worldwide.

The Critical Review Response Time (CRRT) KPI measures how quickly a business responds to critical reviews – **those with a rating of 1 or 2 stars**. This KPI is key in customer relationship management, as it reflects the business's dedication to promptly addressing customer complaints and issues.

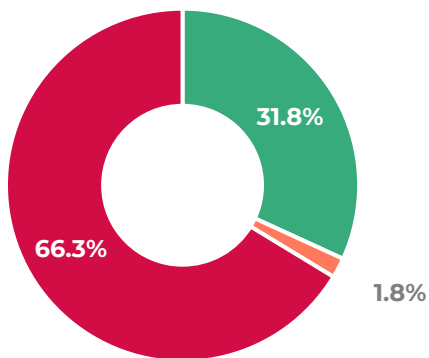
CRRT KPI bands:

- **Excellent**: within 24 hours
- **Fair**: within 72 hours
- **Attention**: more than 72 hours
- **Critical: Not Responded**

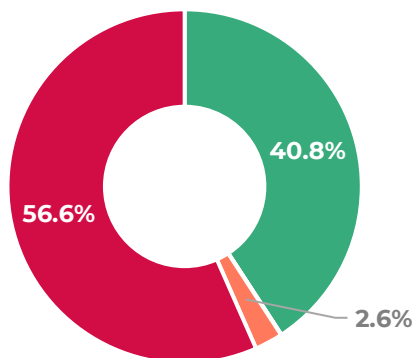
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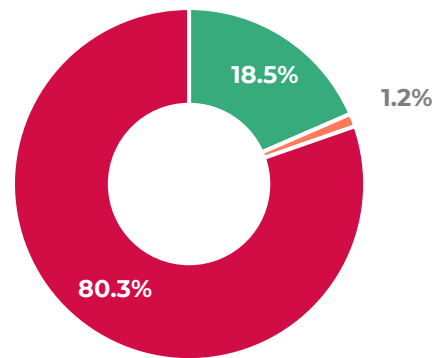
EMEA



AMERICAS



APAC



■ Excellent ■ Fair ■ Attention ■ Critical

REVIEWS WITH COMMENTS VS RATING-ONLY

The analysis shows that even when customers take the time to leave comments about their negative experience, reviews largely go unaddressed across the car wash industry. **Globally, 61.5% of reviews with comments** still receive **no response at all, while rating-only reviews** perform even worse, with **nearly 80% left unanswered**. Regionally, this pattern persists for commented reviews, as **APAC** again records the highest share of **unanswered cases (79.3%)**, followed by **EMEA (65.6%)**. Even in the Americas, over half of commented reviews **(54.1%)** still remain without a response.

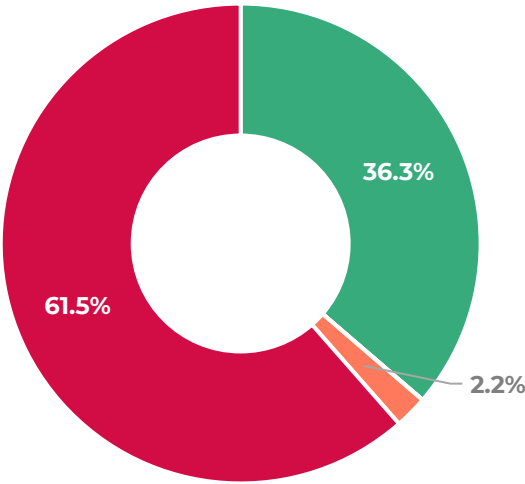
Reviews with Comments: These are reviews where customers provide written feedback along with their rating. The comments can range from positive to negative, giving specific details about the customer's experience. These provide context and a chance to address concerns.

Rating-only Reviews: These are reviews where the customer only leaves a star rating without any additional comments or details. While these reviews provide less context for other customers and the business, a quick acknowledgment can still be beneficial.

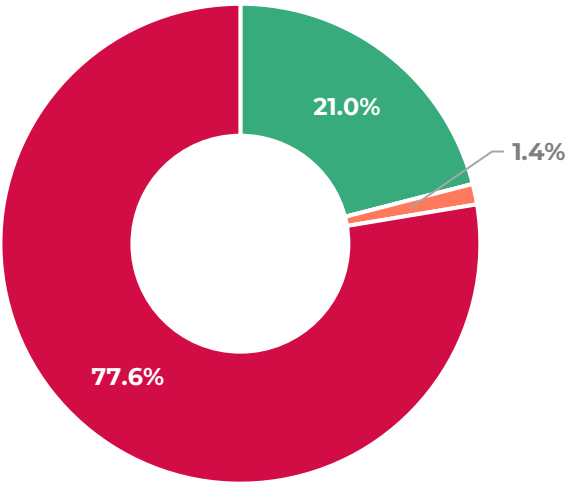
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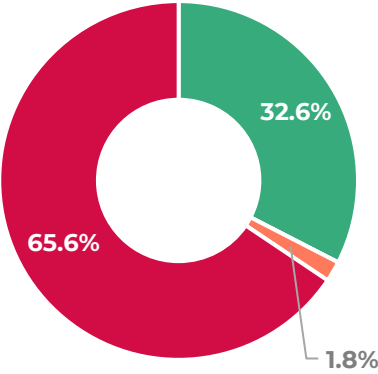
CRRT: REVIEWS WITH COMMENTS



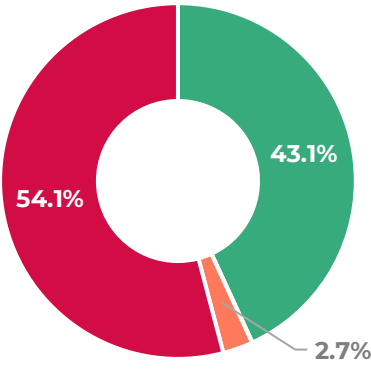
CRRT: REVIEWS WITH RATING-ONLY



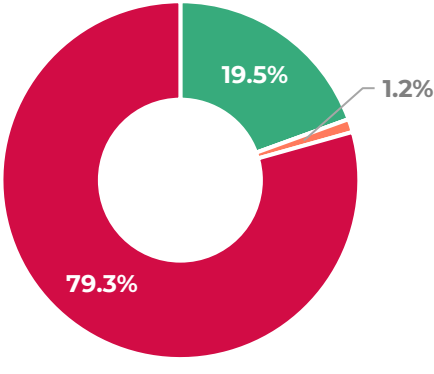
EMEA



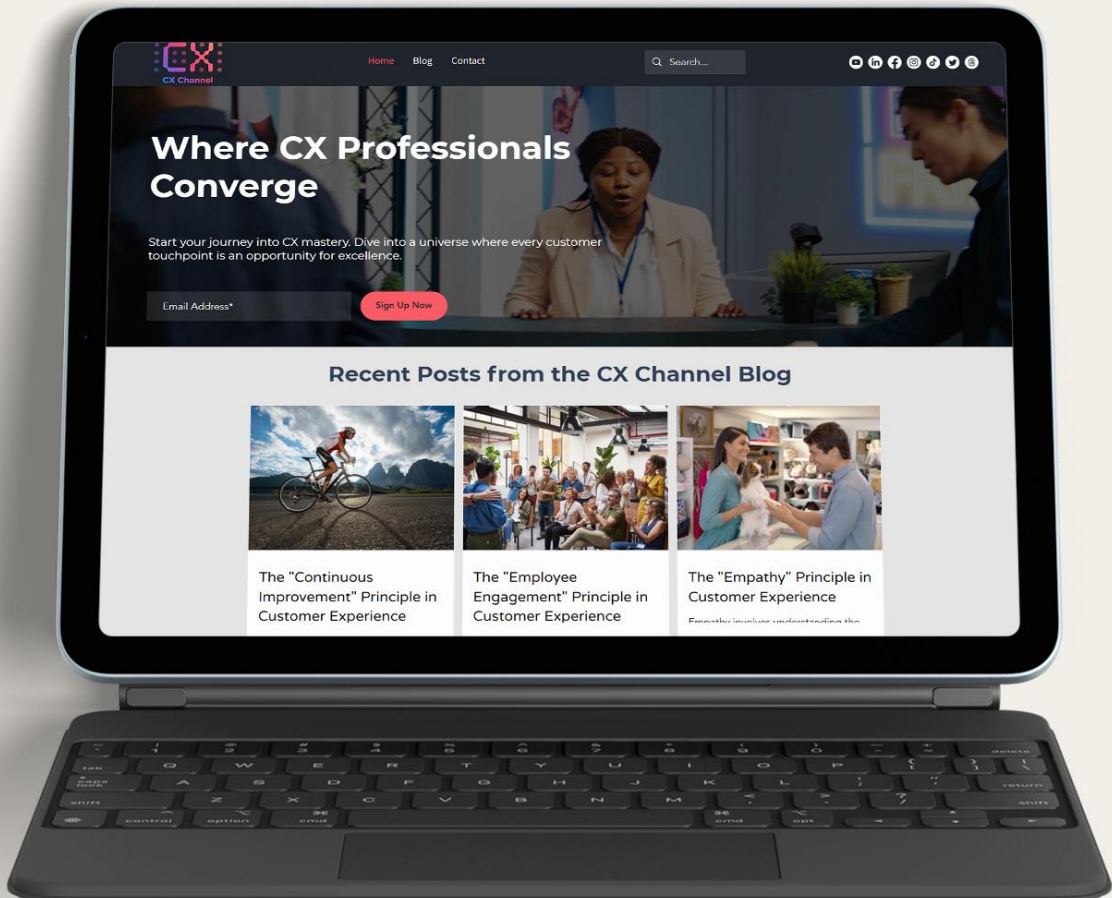
AMERICAS



APAC



Excellent Fair Attention Critical



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Car Washes: **Marketing Mix**

In the car wash industry, the 7Ps – Product, Price, Place, Promotion, People, Process, and Physical Evidence – come together to shape customer perceptions of quality, reliability, and value at every visit, influencing both immediate satisfaction and the likelihood of repeat usage.

This section explores how car wash performance, pricing alignment, and site conditions influence customer choice, while memberships and offers support repeat behavior. It also highlights the critical role of frontline execution and process discipline in delivering fast, consistent service. Together, these elements explain how car wash brands can improve experience consistency, strengthen confidence, and compete effectively in a high-frequency service market.

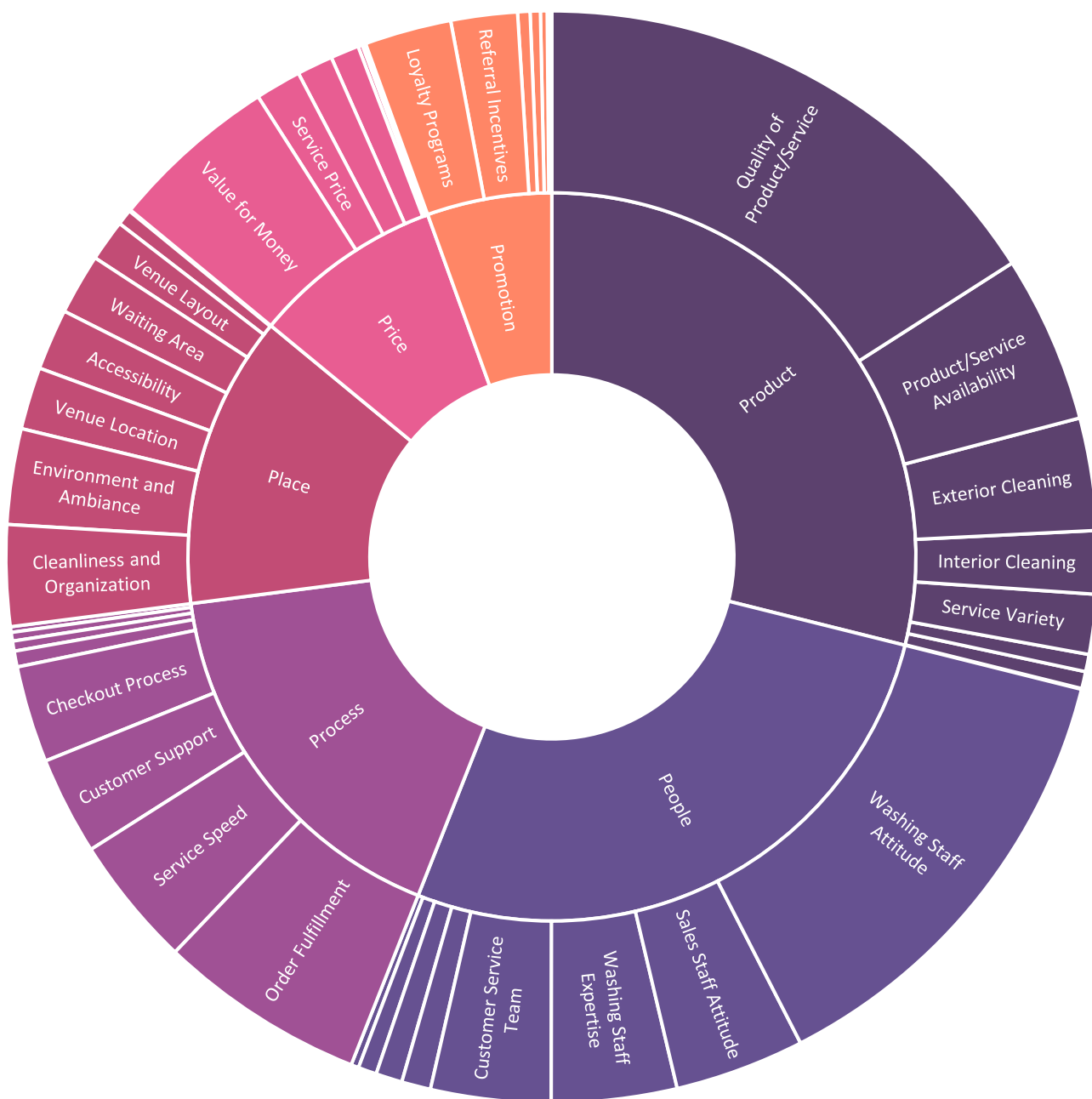
MARKETING MIX ELEMENTS

What Do Customers Talk [Care] About?

Customer feedback in the car wash industry is **heavily concentrated around Product, People, and Process**, which together account for nearly **two thirds (73%)** of all mentions, highlighting the importance of service quality and frontline staff performance. Place, Price, and Promotion trail behind, indicating that operational delivery and human interaction play a stronger role than commercial levers in shaping customer experience.

Behind these results lies a clear message: customers respond most strongly to wash **quality and consistency**, supported by attentive staff interactions and smooth, time-efficient processes. Together, these elements form the foundation of reliability, satisfaction, and repeat usage that define a successful car wash experience.

The 7P Marketing Mix is an extended version of the traditional 4P concept. It includes the following seven elements: Product, Price, Place, Promotion, People, Process, and Physical Evidence. This model provides a more comprehensive framework for businesses to evaluate and improve their CX and marketing strategies.



Explore the top 5 features within each marketing mix element on the next page. ►

MARKETING MIX ELEMENTS AND FEATURES

Which Details Do Customers Prioritize?

Customer feedback in the car wash industry is primarily driven by core service delivery and frontline interaction, with **Quality of Product/Service (16.0%)** and **Washing Staff Attitude (13.6%)** standing out as the strongest contributors to overall experience. Customers consistently emphasize reliable cleaning results, professional and attentive staff behavior, and fast, well-coordinated service execution as the key factors shaping customer satisfaction.

At the core of the car wash experience are frontline interactions, where staff attitude and expertise strongly influence first impressions and overall satisfaction. Polite, efficient handling of vehicles, attention to detail, and a sense of care during service delivery help customers feel confident and respected, turning a routine wash into a positive, trust-building encounter.

Alongside human interaction, consistent wash quality and service availability play a decisive role in shaping expectations. Reliable cleaning results, efficient order fulfillment, and fast service speed – supported by clean, well-organized facilities and adequate pricing - reduce friction and reinforce value, delivering a smooth and dependable car wash journey that encourages repeat visits.

MARKETING MIX ELEMENT	MARKETING MIX ELEMENT FEATURE	% OF THE MARKETING MIX	
Product	► Quality of Product/Service	15.95%	90.3% of Product
	► Product/Service Availability	4.94%	
	Exterior Cleaning	3.32%	
	Exterior Cleaning	1.87%	
	Other	2.80%	
People	► Washing Staff Attitude	13.57%	91.1% of People
	Sales Staff Attitude	3.84%	
	Washing Staff Expertise	3.70%	
	Customer Service Team	3.56%	
	Other	2.42%	
Process	► Order Fulfillment	6.13%	93.0% of Process
	Service Speed	3.88%	
	Customer Support	2.91%	
	Checkout Process	2.86%	
	Other	1.19%	
Place	Cleanliness and Organization	2.99%	72.8% of Place
	Environment and Ambiance	2.83%	
	Venue Location	1.84%	
	Accessibility and Safety	1.81%	
	Other	3.53%	
Price	► Value for Money	4.99%	97.2% of Price
	Price	1.36%	
	Clear Pricing	1.07%	
	Competitive Pricing	0.84%	
	Other	0.24%	
Promotion	Loyalty Programs	2.57%	93.4% of Promotion
	Referral Incentives	1.97%	
	Discounts and Offers	0.36%	
	In-Venue Promotions	0.30%	
	Other	0.37%	

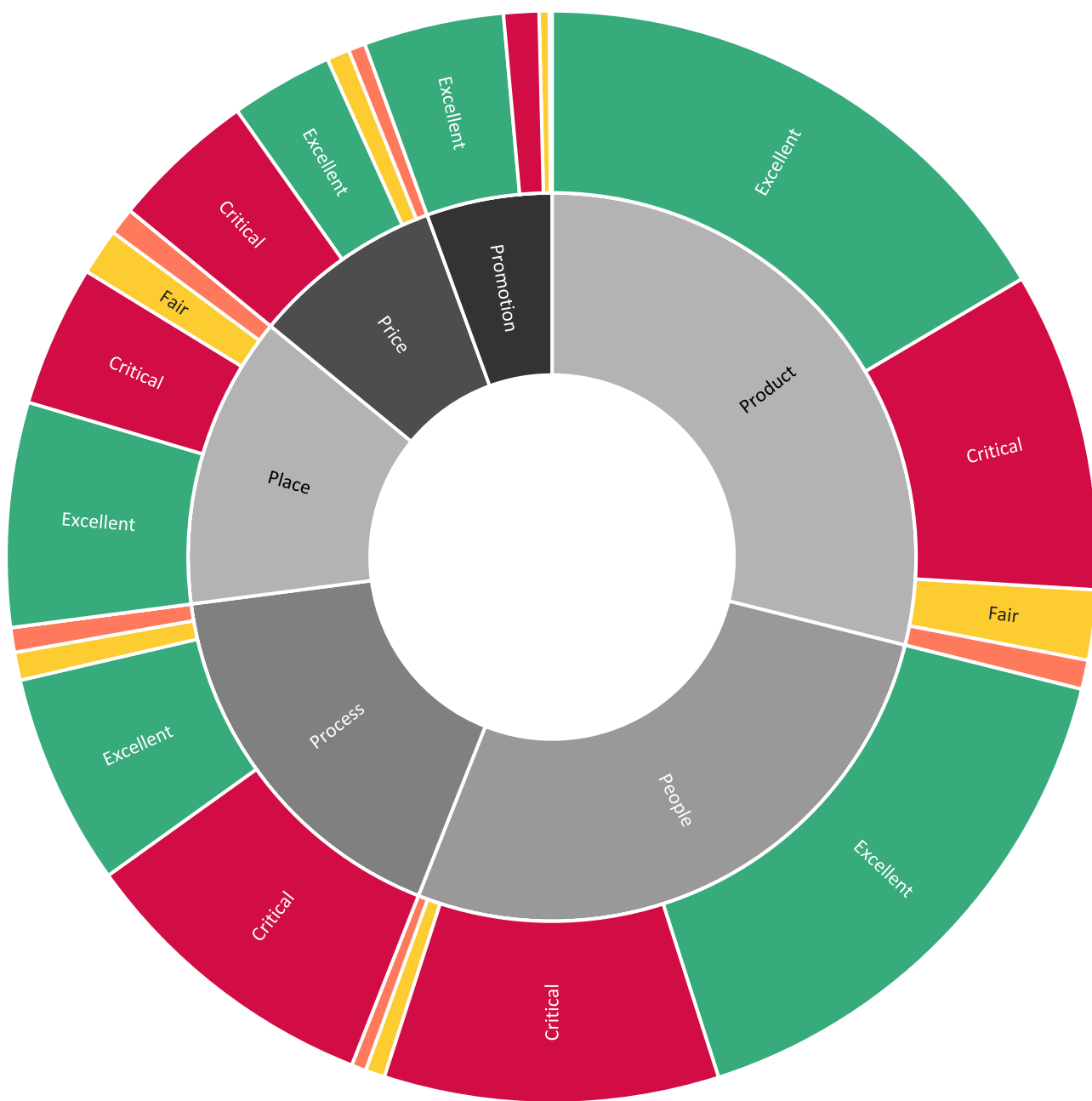
MARKETING MIX EXPERIENCES

Understanding Customer Sentiments, Thoughts, and Feelings

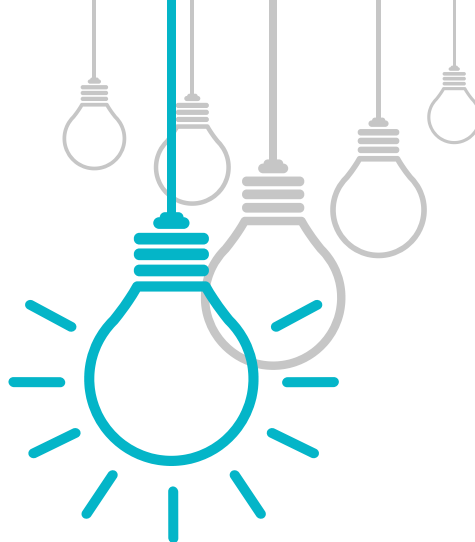
The car wash industry experience reveals clear weaknesses in service delivery. **Process** stands out as the **most significant pressure point**, with over half of all process-related feedback rated as **critical**. **Price** also shows **high dissatisfaction**, with around **50%** of price-related feedback classified as critical. High levels of negative feedback are also present across **People** and **Product**, pointing to gaps in frontline execution and wash quality as well.

Customer comments suggest that negative experiences are driven less by isolated incidents and more by recurring issues – such as inconsistent cleaning results, lack of ownership when problems arise, and operational delays. Friction linked to Price further reflects uncertainty around perceived value, while Place issues highlight the impact of site conditions and organization on overall impressions.

To improve performance, car wash providers must focus on order fulfillment and clear ownership. Streamlining service flows, reinforcing staff responsibility at each touchpoint and setting clear quality standards are essential steps. When combined with transparent pricing, aligned with delivered quality and well-maintained locations, these actions strengthen experience consistency and customer confidence.



KEY TAKEAWAYS



Analyzing customer feedback across reviews, response behavior, and experience drivers reveals a car wash industry that delivers functional service but struggles with consistency, recovery, and value perception. The insights point to clear priorities where focused action can significantly elevate everyday customer experience.



Act on Critical Feedback:

Almost 2/3 of critical reviews globally remain unanswered, with APAC reaching over 80%, weakening trust when dissatisfaction is highest. Faster acknowledgment is essential to recover confidence.



Stabilize Process and Price:

Service flow is the most fragile experience area, with pricing closely following. Improving execution across daily operations and aligning price with delivered quality are key to reducing friction.



Focus on What Matters Most:

Customer feedback concentrates on Product, People and Process, signaling where focus should be placed to strengthen the overall car wash experience.



Get the Basics Right, Every Time:

Wash quality, staff attitude, and order fulfillment are key drivers of satisfaction. Consistent delivery across these elements determines repeat visits and sustained loyalty.

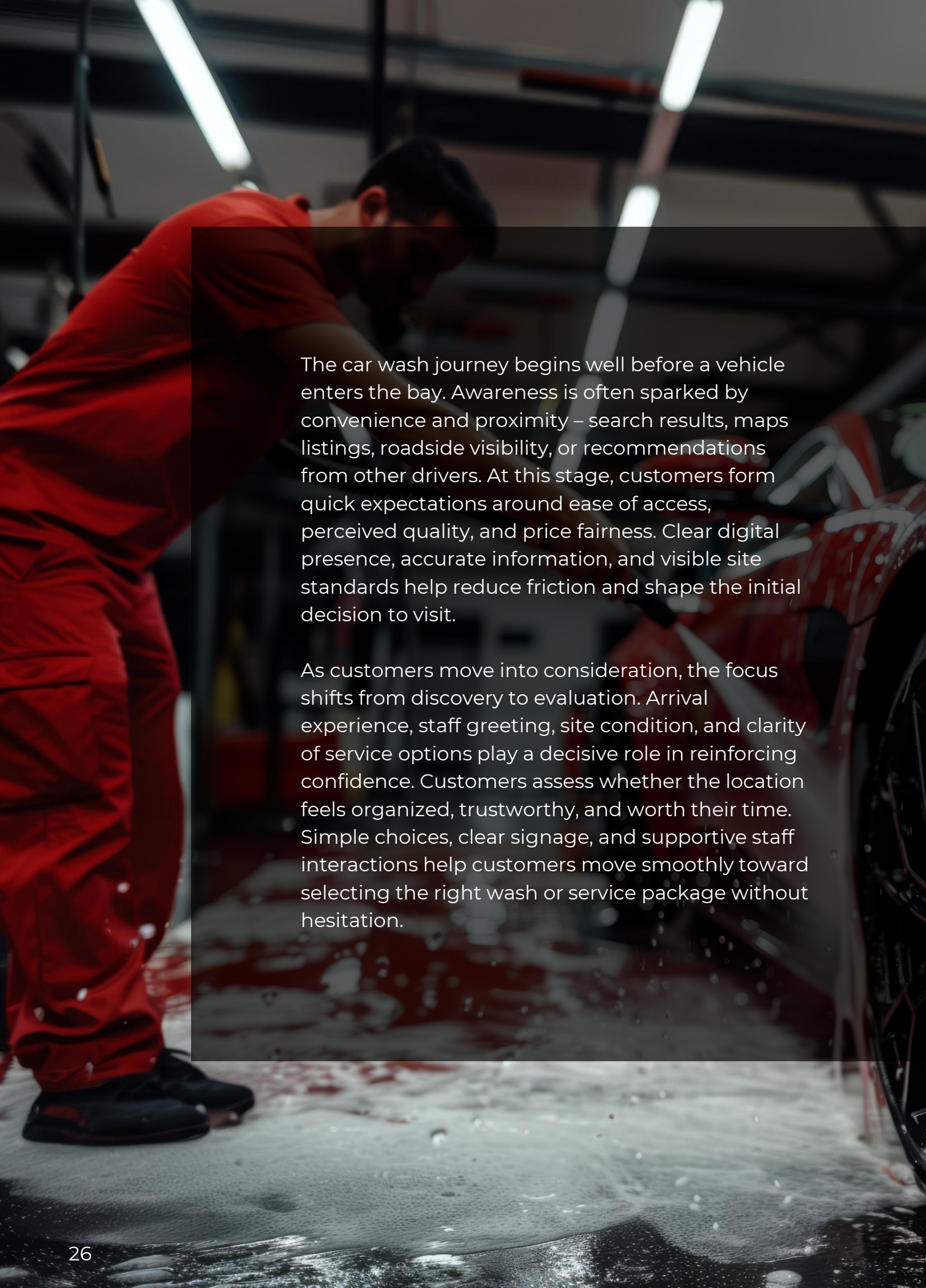
By acting decisively on customer feedback, reinforcing experience fundamentals, and delivering consistent quality with fair value, car wash operators can transform everyday visits into reliable experiences that build trust, and encourage return behavior,



Car Washes: **Customer Journey**

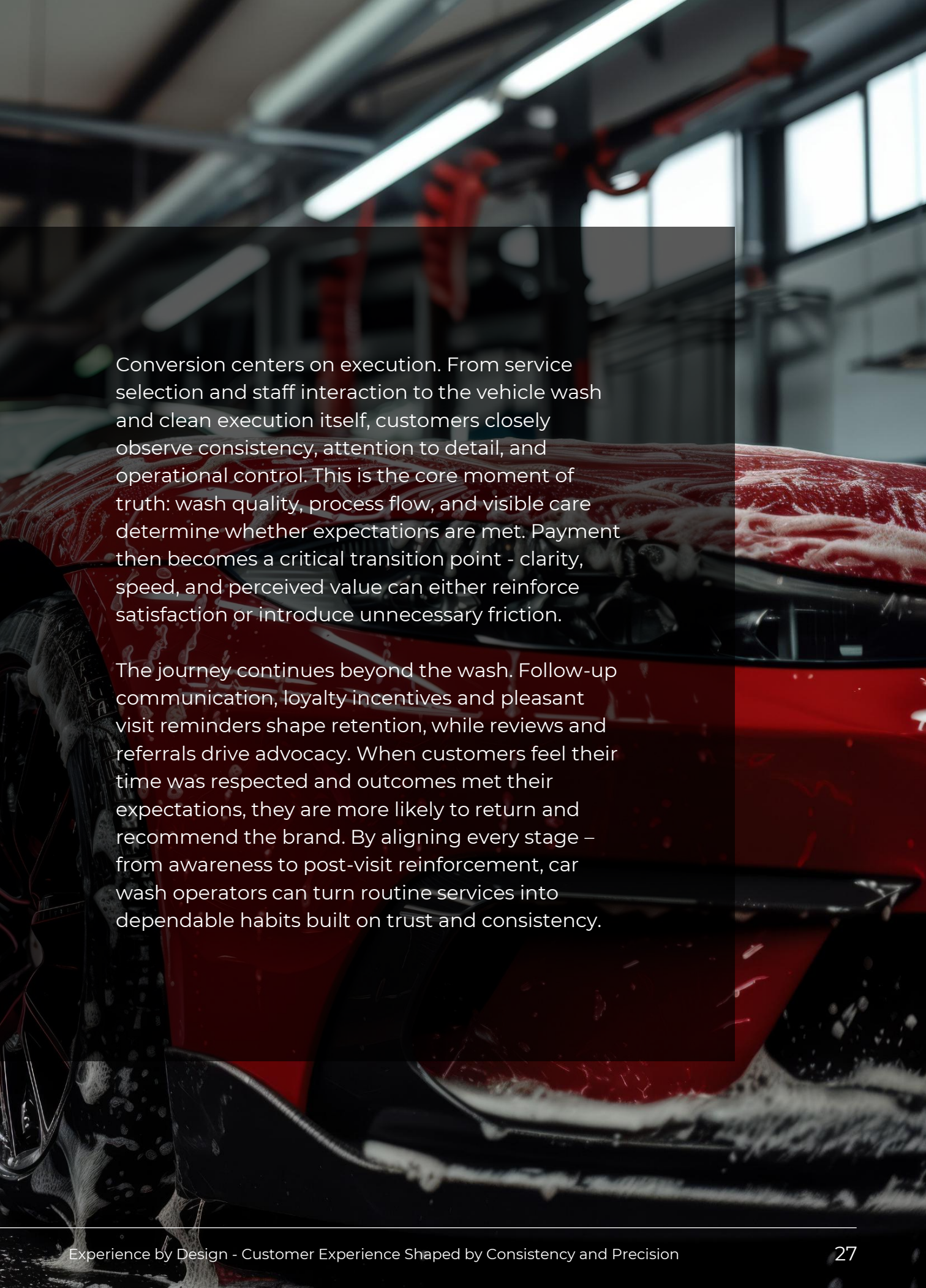
A car wash experience unfolds as a sequence of small, repeatable moments rather than a single transaction. It starts with a practical need and a fast decision, moves through arrival, service selection, and on-site interactions, and continues with payment, follow-up, and future return intent. Each moment – from the first impression at the location to the final condition of the vehicle – shapes how customers judge reliability, care, and overall value.

This section maps the full car wash customer journey across five stages, from Awareness and Consideration to Conversion, Retention, and Advocacy. Within each stage, customers engage with a set of high-impact touchpoints that influence satisfaction and behavior. Understanding how these moments connect helps car wash operators deliver smoother experiences, strengthen trust, and encourage repeat visits.

A car wash worker in a red uniform is shown from the side, leaning forward and spraying a car with a high-pressure water nozzle. The worker is wearing a red long-sleeved shirt and red pants. The car is partially visible on the right side of the frame, with water being sprayed onto its surface. The background is a blurred car wash bay with overhead lights.

The car wash journey begins well before a vehicle enters the bay. Awareness is often sparked by convenience and proximity – search results, maps listings, roadside visibility, or recommendations from other drivers. At this stage, customers form quick expectations around ease of access, perceived quality, and price fairness. Clear digital presence, accurate information, and visible site standards help reduce friction and shape the initial decision to visit.

As customers move into consideration, the focus shifts from discovery to evaluation. Arrival experience, staff greeting, site condition, and clarity of service options play a decisive role in reinforcing confidence. Customers assess whether the location feels organized, trustworthy, and worth their time. Simple choices, clear signage, and supportive staff interactions help customers move smoothly toward selecting the right wash or service package without hesitation.



Conversion centers on execution. From service selection and staff interaction to the vehicle wash and clean execution itself, customers closely observe consistency, attention to detail, and operational control. This is the core moment of truth: wash quality, process flow, and visible care determine whether expectations are met. Payment then becomes a critical transition point - clarity, speed, and perceived value can either reinforce satisfaction or introduce unnecessary friction.

The journey continues beyond the wash. Follow-up communication, loyalty incentives and pleasant visit reminders shape retention, while reviews and referrals drive advocacy. When customers feel their time was respected and outcomes met their expectations, they are more likely to return and recommend the brand. By aligning every stage – from awareness to post-visit reinforcement, car wash operators can turn routine services into dependable habits built on trust and consistency.

CUSTOMER JOURNEY MAP: CAR WASHES

In this analysis, we examine a typical **5-stage** Customer Journey Map that includes **11 distinct steps** reflecting the evolution of the customer experience.

The Customer Journey refers to the various stages a customer goes through while interacting with a company or brand – from the initial contact to the eventual purchase, and beyond.

The Customer Journey Map is a visual diagram that shows the Customer Journey. The Customer Journey Map helps businesses understand and analyze their customers' experiences, identify pain points, uncover opportunities for improvement and ultimately enhance the overall customer experience.

Awareness

Becomes aware of a brand, product, or service

Consideration

Researches and evaluates potential solutions

Conversion

Chooses a product or service and makes a purchase

Retention

Delivery, use, additional purchases of product or service

Advocacy

Advocate, shares the positive experience with others



CUSTOMER JOURNEY MAP: CAR WASHES





































We outline the full customer journey as a structured flow across five interconnected stages, capturing how engagement builds and evolves:

- **Awareness**
- **Consideration**
- **Conversion**
- **Retention**
- **Advocacy**

Each stage represents a step in a customer's relationship with a car wash service provider – from recognizing the need for a clean vehicle to becoming a repeat visitor who recommends a trusted location. What starts as a routine task can evolve into preference when expectations are consistently met.

Along the journey, customers move through practical touchpoints: finding a nearby location, assessing service options and pricing, arriving on-site, interacting briefly with staff, observing the wash and cleaning process, and completing payment. Each moment shapes perceptions of reliability, care, and value.

These interactions allow operators to demonstrate service quality and operational discipline. When discovery is effortless and execution feels smooth and predictable, car wash providers can increase satisfaction, encourage repeat visits, and build loyalty through consistent delivery.

Awareness	Need Identification and Exploration Realize vehicle needs cleaning or maintenance, research options.	 Online search	 Social media	 Local listings	Locate a car wash facility with quality service.	 CSAT
	Research Services Range (Online and Offline) Visit the car wash's website or the physical location to assess services.	 Websites	 In-person visit		Evaluate service quality, options, and pricing.	 CES
Consideration	Greeting from Staff Be greeted and informed about services by staff upon arrival.	 Service counters	 Greeting area		Receive prompt and friendly information about services.	 CES
	Experience Location Ambience Observe the cleanliness, amenities, and the waiting area.	 Waiting area	 Restroom	 Facility surroundings	Have a comfortable place to wait during service.	 CSAT
Conversion	Product/Service Selection Choose a car wash package or specific detailing services.	 Menu boards	 Service brochures		Select the best service options for their car's condition.	 CSAT
	Staff Interaction Discuss service details with a consultant or technician.	 Consultation area	 Service bay		Confirm the chosen services and any additional needs.	 CSAT
	Vehicle Wash & Clean Observe the car wash process, either automated or manual.	 Car wash area	 Observation windows		Ensure their car is being cleaned thoroughly and safely.	 CES
	Payment Process Pay for the service at the cashier or self-service kiosk.	 Cashier	 Self-service kiosks		Complete the transaction quickly and securely.	 CES
	Follow-Up and Feedback Receive a service feedback request and possibly a discount for next visit.	 Feedback forms	 Email follow-up		Feel valued as a customer and provide service feedback.	 CSAT
Retention	Loyalty and Rewards Incentives Join a loyalty program and benefit from future discounts or services.	 Loyalty program signup	 Promotional materials		Save money and feel incentivized to return.	 CSAT
	Word of Mouth and Loyalist Referrals Share their positive experience and recommend the service.	 Social media	 Referral cards	 Review sites	Promote the car wash's quality service to others.	 NPS
Advocacy						

CUSTOMER JOURNEY STAGES

Awareness

The Awareness stage begins when customers recognize a need to clean or maintain their vehicle – often triggered by weather conditions, visible dirt, routine care habits, or preparation for an upcoming occasion.

Consideration

In the Consideration stage, customers compare car wash providers based on service range, pricing clarity, location convenience, and perceived service quality. They seek reassurance that the car wash will be thorough, safe for their vehicle, and worth the time and cost.

Conversion

The Conversion stage is where intent turns into action, as customers select a wash option and proceed with the car wash service. This phase plays a critical role in shaping trust, as customers expect the process to be efficient, controlled, and aligned with what was promised.

Retention

The Retention stage focuses on reinforcing satisfaction after the service is completed, ensuring that customers feel the wash delivered good value and met their expectations for quality and care.

Advocacy

In the Advocacy stage, satisfied customers become promoters, sharing their positive impressions and reinforcing the car wash's reputation for reliability and consistency.

Customers draw on personal routines, online search, location visibility, and online reviews to identify nearby car wash options that align with their expectations for convenience, quality, and reliability.

This stage involves reviewing service packages online or on-site, assessing facilities and cleanliness, and forming first impressions through signage, layout, and staff interaction. A clear explanation of services and a friendly greeting help customers feel confident in their choice.

During this stage, customers confirm their service choice, interact with staff or self-service systems, and observe the vehicle wash and cleaning process in real time. Attention shifts to execution – wash quality, equipment performance, process flow, and visible care for the vehicle. Clear instructions, smooth transitions between steps, and transparent pricing at payment reinforce confidence. A frictionless checkout, supported by intuitive payment options and clear confirmation, completes the conversion and leaves a lasting impression at the most decisive moment of the journey.

Follow-up touchpoints such as feedback requests, digital receipts, discounts, or loyalty programs help maintain engagement. Consistent results and easy re-entry into the service encourage customers to return as part of their regular routine.

They leave online reviews, recommend the location to friends or family, and return repeatedly, helping attract new customers through trusted word of mouth and visible repeat behavior.

SUMMARY

The car wash journey is a sequence of practical, repeatable moments that guide customers from an initial need - often triggered by routine upkeep or environmental conditions, to a completed service they can trust. Each stage, from awareness and consideration to on-site execution and payment, plays a role in shaping perceptions of reliability, care, and value.

This journey goes beyond a simple service transaction. Clear signage, well-maintained facilities, attentive staff interactions, and visible wash and cleaning execution reassure customers that their vehicle is handled with care and precision. Transparent pricing and smooth payment processes further reinforce confidence, making the overall visit feel hassle-free.

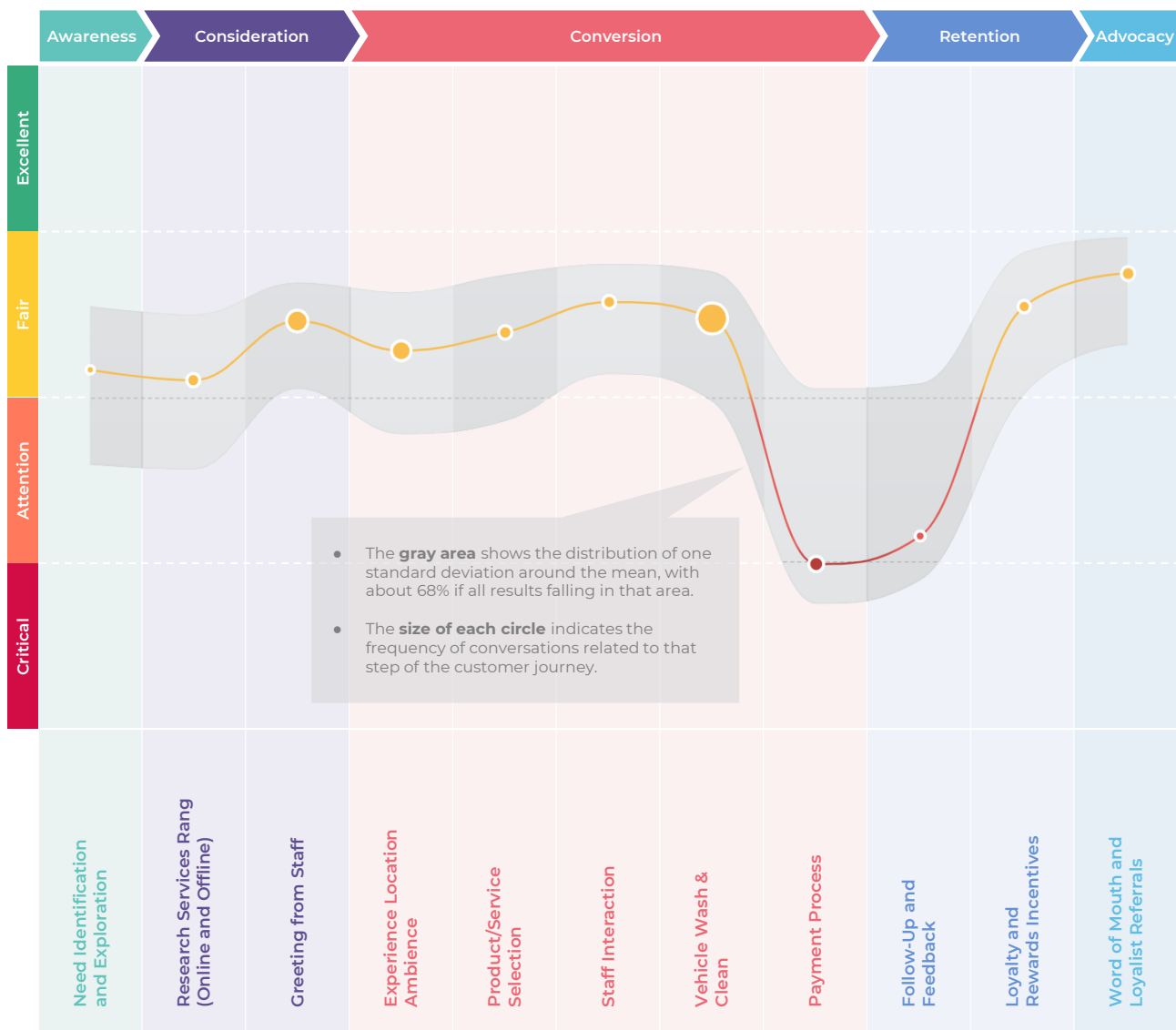
Long-term success depends on consistency and continued engagement. By capturing feedback, maintaining service standards, and offering loyalty incentives or return benefits, car wash operators can transform routine visits into repeat behavior – turning satisfied customers into regular users and advocates.

THE MOMENT OF TRUTH

Overall, the car wash customer journey reflects a functional but **fragile experience**, with **no stage** clearly **delivering standout performance**. Most interactions operate at a basic level, with visible drops to critical levels at key moments – **most notably during the Payment Process and Follow-up and Feedback** steps – where expectations for clarity and responsiveness are highest. These weak points highlight how gaps at critical moments can undermine the entire journey, limiting confidence and reducing the potential for repeat visits.

The chart illustrates customer sentiment during the various phases of the Customer Journey. Areas shaded in the graph denote the standard deviation from the average, highlighting the degree of variability at each step and signifying the need for more precise measurement techniques.

The circles on the graph correspond to the frequency of specific elements noted at each phase, with larger circles indicating steps with more frequently cited attributes. This visualization aids in identifying which areas to prioritize for strategic focus.



SENTIMENT BANDS

Excellent	0.5 to 1.0
Fair	between 0.0 and 0.5
Attention	0.0 to -0.5 (excluded)
Critical	-0.5 to -1.0

CASE IN POINT

Aspect-Based Sentiment Analysis (ABSA) is particularly effective for analyzing online reviews and ratings by providing detailed, aspect-specific insights.

A customer review may read:



My visit to the car wash was okay but had several issues. The location was convenient and the site looked reasonably clean, which gave a good first impression. There was no staff when I arrived, and the service options were not clearly explained, so getting started felt a bit confusing. However, the staff member was polite and helpful. Choosing a package was simple, but the wash left visible dirt and water marks on parts of my car. Paying was the most frustrating part, as the self-service machine was very slow and the final bill included some extra charges I wasn't expecting.

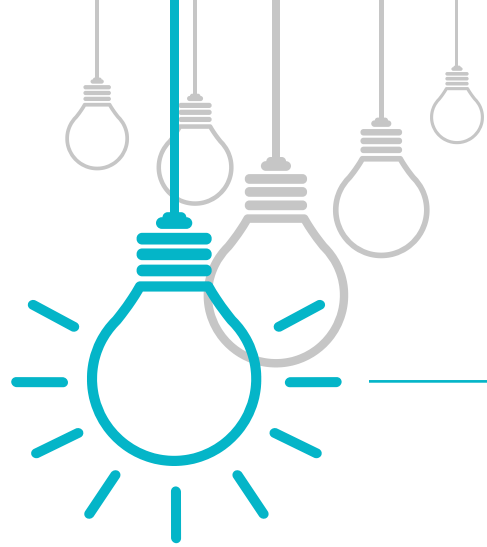
Aspect	Modifier	Sentiment
Location & Cleanliness	Convenient and reasonably clean	Positive
Staff Availability	No staff available on arrival	Negative
Staff Attitude	Polite and helpful	Positive
Service Information	Not clearly explained	Negative
Vehicle Wash & Clean	Visible dirt and water marks	Negative
Payment Process	Frustrating, slow, extra charges	Negative

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Aspect-Based Sentiment Analysis (ABSA) excels in extracting deeper insights from customer interactions by categorizing aspects of the product, service, or experience being reviewed. It then evaluates the modifying words or phrases in the review, assigning them a sentiment polarity – positive, neutral, or negative – to gauge customer opinions.

ABSA is not, however, without some limitations. Notably, complexity in language and expression: people who frequently employ idioms, sarcasm, or metaphors can pose difficulties for accurate interpretation.

KEY TAKEAWAYS



Mapping customer sentiment across the car wash journey reveals a sequence of fragile moments rather than clear experience highs. While the journey functions end to end, uneven execution at critical steps limits confidence, satisfaction, and repeat intent. Understanding where sentiment drops is key to strengthening the overall experience.



Improve Wash & Clean Execution

The wash and cleaning phase is the core moment of truth, yet performance remains fragile. Improving consistency, attention to detail, and execution control is essential to reinforce confidence in the car wash experience.



Close the Follow-Up Gap

Post-service follow-up remains a weak point, leaving customers feeling overlooked after the visit. Timely acknowledgment, clear communication, and active listening are essential to restore confidence and support repeat purchases.



Remove Payment Friction

The payment moment shows one of the sharpest experience drops, disrupting the journey just before completion. Simplifying payment flow and reinforcing value perception are critical to a positive experience.



Drive Immediate Improvements:

With no stage clearly excelling, the journey is shaped by fragile transitions rather than strong peaks. Targeted improvements at key touchpoints - especially during and after the wash and cleaning execution, can elevate the overall experience.

By strengthening execution at the core service moment and acting quickly on critical gaps around payment and follow-up, car wash operators can turn a fragile journey into a more consistent, confidence-building customer experience.

MEET THE EXPERT



Meet the experts featured in our podcast series. Discover their backgrounds, unique perspectives, and invaluable contributions to the field of Customer Experience.

JASON BARE

Jason Bare is President of BARE International, a global customer experience research and consulting firm specializing in Mystery Shopping, Business Intelligence Solutions, CSAT Surveys, Pricing Audits, and related insight-driven solutions.

With more than two decades of experience, Jason leads the company's strategic direction and global operations, partnering with organizations across hospitality, retail, food service, and financial services to turn customer insights into measurable business results. Jason is known for his practical, data-driven approach to customer experience and is a frequent contributor to industry conversations on service culture, brand consistency, and operational excellence.

Before fully joining BARE International, Jason built early professional experience in the sports and entertainment industry, where working alongside elite teams and high-performance environments sharpened his appreciation for consistency, execution, and accountability.

Growing up in a family-run customer experience business, he was immersed in CX long before it became a formal discipline, developing a natural sensitivity to service quality, frontline behavior, and the impact of small moments on customer perception. This blend of performance-driven experience and early exposure to CX continues to shape his practical, hands-on approach to helping organizations improve service delivery and operational consistency at scale.





FROM DATA TO ACTION: TURNING CUSTOMER INSIGHT INTO REAL CHANGE

Customer experience data has never been more accessible, yet many organizations still struggle to convert insight into meaningful improvement. In the car wash industry, where service moments are frequent and repeatable, and operational cycles are short, data becomes powerful when it informs daily decisions. For Jason Bare, that success depends not only on collecting more feedback, but on acting faster, with clear ownership and intent.

“There are many ways to gather data. The key thing is that once you've gathered this data, you need to be actionable with it.”

– Jason Bare

Jason begins by addressing a common misconception: collecting more data automatically leads to better decisions.

“You can't just invest in conducting a mystery shopping or a market research program, get the data and have it sit in your platform.”

Data collection, on its own, does not improve customer experience unless it is paired with intent and accountability. Without a clear action plan, even the most robust CX programs lose relevance. Data that remains static quickly becomes disconnected from the day-to-day reality of operations, failing to influence service quality and or delivered outcomes.

Jason emphasizes that insight only gains value once teams slow down to truly interpret what customers are saying. *“You've really got to digest that information and figure out what next best steps to take with that information to enhance your company,”* he explains. This step requires moving beyond headline scores and looking for patterns that point to practical improvements - whether in service execution or operational flow. Without this deeper reflection, feedback risks being acknowledged but not meaningfully applied.

Equally important is how quickly issues are surfaced and addressed. Jason highlights that recurring problems should never linger unnoticed. *“So, issues like repeat complaints about...dryers or vacuums or the line...do not sit in a report for months. They surface quickly so then the managers can trigger an action based on what they've read,”* he notes. By reviewing feedback regularly and discussing it openly, teams can respond while issues are still relevant, preventing frustrations from becoming ingrained customer perceptions.

Jason's message is clear: data collection is only the starting point. As he states, *“There are many ways to gather data. The key thing is that once you've gathered this data, you need to be actionable with it.”* In high-frequency services like car washes, where customer signals surface quickly and patterns repeat, the ability to respond decisively determines whether insight drives improvement or fades into noise. When feedback is reviewed, discussed, and acted on in real time, it becomes a powerful engine for operational excellence and sustained customer loyalty.



CONSISTENCY OVER COMPLEXITY: HOW RELIABILITY SHAPES CUSTOMER PERCEPTION

In a category often defined by speed and automation, differentiation rarely comes from adding more features. Jason Bare emphasizes that what customers value most in car wash services is not novelty, but reliability. Across repeated visits and locations, consistency becomes the strongest signal of quality — and the fastest way to earn loyalty.

“Great experiences do not come from one standout moment. They come from delivering the basics every time, across every location.”

– Jason Bare

Jason challenges the assumption that innovation alone is what drives customer satisfaction. Instead, he highlights predictability and reliability as defining factors, particularly in high-frequency services like car washes.

“Research shows that consistency across locations and visits often matters more than adding new features or promotions,” he explains. When customers return regularly – sometimes weekly or even more often – they are not looking for novelty. In this context, even minor variations in service quality, timing, or execution become noticeable and can quickly erode trust.

This expectation is even stronger among loyalty members, who are no longer experimenting but actively committing to a brand. Jason notes that repeat customers establish a benchmark after just a few visits, using past experiences as the standard for every return. When outcomes vary – whether in wash quality, equipment performance, or staff interaction – frustration builds rapidly. Consistency, in this sense, becomes the product itself: a promise that each visit will meet the same reliable standard customers have learned to expect.





*Two Generations of Insight-Driven Leadership:
President Jason Bare with Founders Dale and Mike Bare*

Jason frames consistency not as a branding exercise, but as an operational discipline that needs to hold across every site and every single interaction. He sums it up simply: *“Great experiences do not come from one standout moment. They come from delivering the basics every time, across every location.”* That idea shifts the focus away from adding layers and toward protecting the fundamentals. When service delivery becomes dependent on individual shifts or uneven execution, small gaps start to appear – and customers quickly interpret those gaps as a lack of reliability. For Jason, consistency is sustained only through continuous insight, because *“that one-off [mystery] shop, that one-off day once a quarter, isn’t going to get you what you need.”*

To protect consistency at scale, Jason emphasizes the need for continuous measurement rather than occasional check-ins. As he puts it, *“Consistency is key. And that’s why getting data repetitively - continuously, we believe, is a key factor for companies making decisions”*. Instead, he points to how expectations build through repetition, noting that *“Customers want to know what they are getting, every time.”* Ongoing insight helps operators spot drift early, reinforce standards, and keep performance aligned with what returning customers have learned to expect.

“The differentiation comes from predictability.”
Jason concludes.



SMALL MOMENTS, BIG IMPACT: HUMAN CONNECTION IN AN AUTOMATED WORLD

Automation has reshaped modern customer experiences across industries – from self-service kiosks and apps to AI-driven interactions and unattended environments. Yet Jason Bare is clear: efficiency alone does not define satisfaction. Even in highly automated settings, small human moments remain powerful drivers of perception, trust, and emotional connection.

“Small amounts of human connection across visits make a big impact in the industry, often viewed as purely transactional.”

– Jason Bare



In highly efficient, automated environments, customer perception is increasingly shaped by small human-touch moments rather than technology alone. A brief acknowledgment, clear communication, or a visible sense of presence can quietly influence trust and emotional response, even when the service itself is designed to be fast and transactional. As Jason Bare puts it, *“It’s just that first interaction... ‘Hey, welcome to X brand today. Thanks for coming in.’ That alone can set the tone.”*

Even in environments where face-to-face interaction is minimal, Jason stresses that presence still matters. *“Even if that’s the case, the next interaction of an associate with a handshake or a wave or a smile, that’s going to make a difference.”* These moments don’t slow operations – they humanize them.

Jason also highlights how technology can support, rather than replace, connection. From remote video assistance to order confirmation screens, he points to hybrid models that

preserve eye contact and reassurance. *"You've still got that eye-to-eye interaction, and they were able to answer my questions live."* The goal is not less automation – but better balance.

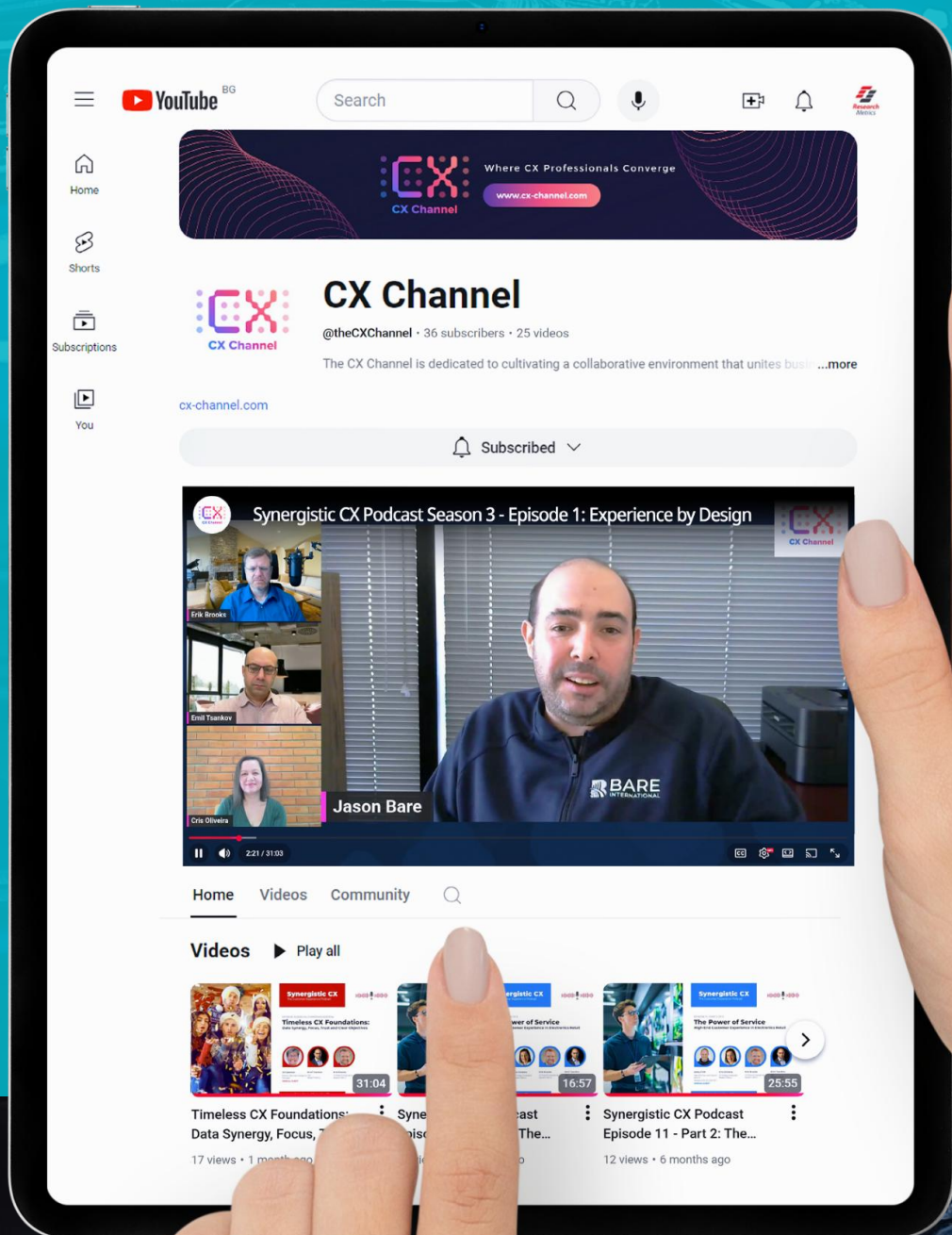
Beyond these small moments, understanding which interactions truly matter requires disciplined use of customer data. Jason emphasizes that not all feedback carries equal value, and that volume alone is not insight. As he explains, *"My number one topic would be staying close to real customer feedback,"* pointing out that detailed, recurring feedback reveals patterns that surface what genuinely

drives satisfaction. When organizations listen selectively and analytically, they can separate noise from signals that deserve action.

He emphasizes that improving these moments does not require large-scale redesigns. Instead, organizations must prioritize what matters most. *"You have to focus on the few experience drivers that truly move satisfaction and loyalty."* By narrowing attention to a small number of critical interactions, teams can protect quality and avoid diluting effort across too many initiatives that fail to resonate with customers.



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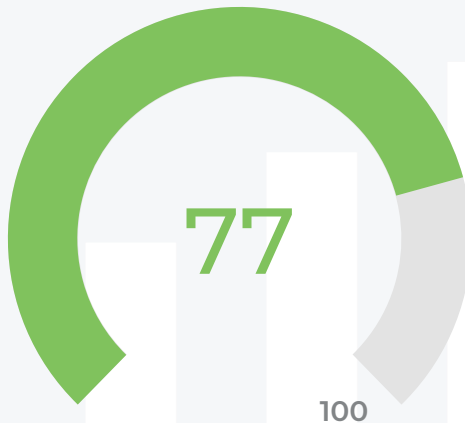
Discover the Path to Experience Excellence

Mystery Shopping's
Impact on Car Washes

KEY CUSTOMER EXPERIENCE METRICS RESULTS

Overall Experience Score (Avg)

196 Total Evaluations



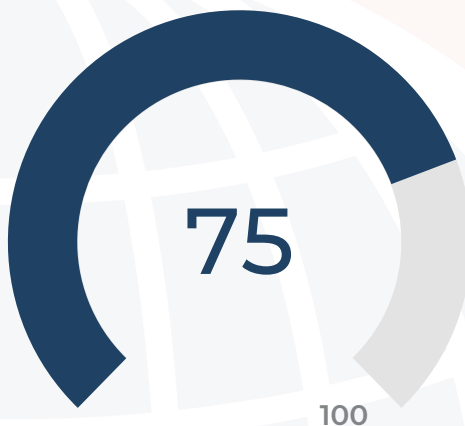
Net Promoter Score

196 Total Evaluations



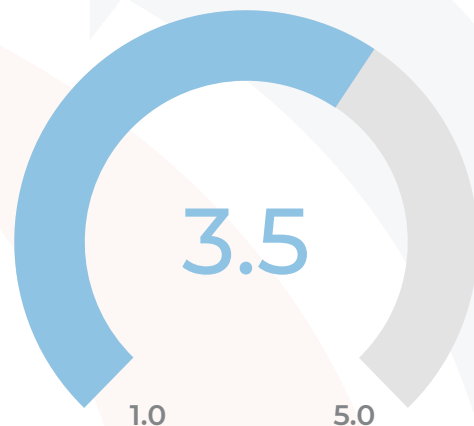
Mystery Shop Score (Avg)

196 Total Evaluations



Customer Satisfaction (Avg)

196 Total Evaluations



BARE CUSTOMER EXPERIENCE METRICS

EXPLAINED

CUSTOMER SATISFACTION SCORE (C-SAT)	CUSTOMER EFFORT SCORE (CES)	NET PROMOTER SCORE (NPS)
<ul style="list-style-type: none"> ▪ Question: Based on your overall experience, how satisfied are you? Please rate on a scale of 1-5 with 5 being the highest. ▪ Measures customer satisfaction with a specific experience. ▪ Scale: 1 to 5 <p>General interpretation:</p> <ul style="list-style-type: none"> - 1 = Very Dissatisfied - 2 = Dissatisfied - 3 = Neutral - 4 = Satisfied - 5 = Very Satisfied 	<ul style="list-style-type: none"> ▪ Question: Rate the overall process of finding a resolution to your inquiry. ▪ Measures how easy it was to interact with a company. ▪ Scale: 1 to 7 <p>General interpretation:</p> <ul style="list-style-type: none"> - 1 = Too much effort and very difficult - 2 = Extra effort and some difficulty - 3 = More than average effort and minor difficulty - 4 = Average effort with average difficulty - 5 = Some effort and mostly easy - 6 = Minimal effort and fairly easy - 7 = Effortless and easy 	<ul style="list-style-type: none"> ▪ Question: On a scale of 0-10, how likely are you to recommend [Brand] to a friend or colleague? ▪ Measures customer loyalty and likelihood to recommend. ▪ Scale: 0 to 10 <ul style="list-style-type: none"> - Promoters (9-10) - Passives (7-8) - Detractors (0-6) ▪ Calculation: NPS = %Promoters - %Detractors <ul style="list-style-type: none"> o Result ranges from -100 to +100 o General interpretation: <ul style="list-style-type: none"> - ≤ 0: Poor - 1 - 30: Good - 31 - 70: Great - 71 - 100: Excellent

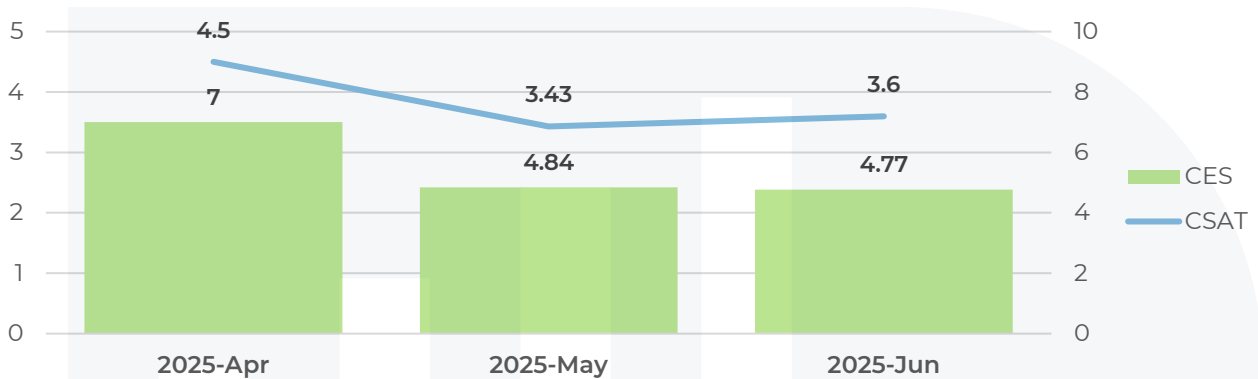


CUSTOMER EXPERIENCE METRICS

C-SAT, CES, & NPS

Interaction between CES and C-SAT

C-SAT and Customer Effort Score
By month

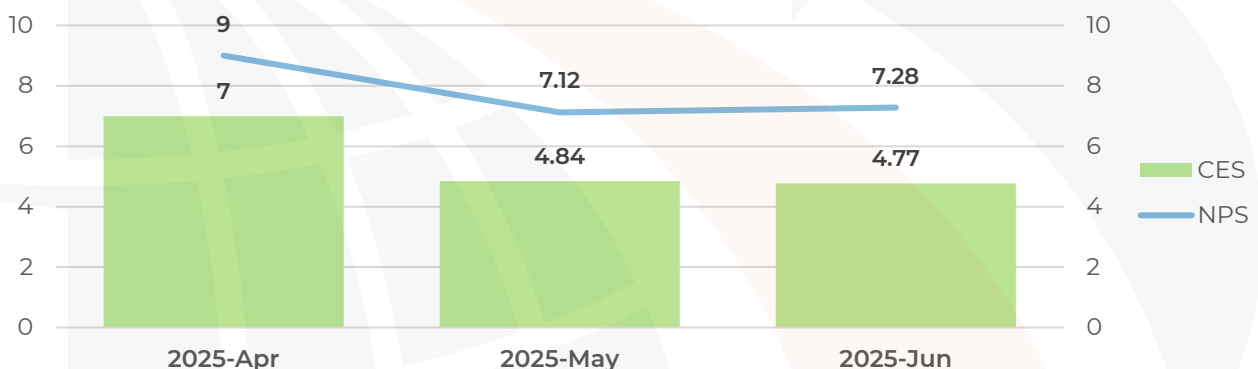


This chart illustrates how **Customer Effort Score (CES)** and **Customer Satisfaction (CSAT)** move together: as effort increases, satisfaction tends to decrease.

This is an example of how **customer satisfaction is influenced by the amount of effort customers must put into an interaction**. When customers perceive the process as easier (lower effort), satisfaction generally stabilizes or improves; when the experience feels more demanding, satisfaction tends to decline.

Net Promoter Score (NPS) and Customer Effort Score (CES)

NPS and Customer Effort Score
By month



This chart demonstrates how changes in **Customer Effort Score (CES)** often align with shifts in **Net Promoter Score (NPS)**. As the perceived effort decreases, customers become slightly more willing to recommend the brand.

This is an example of how **reducing customer effort supports stronger loyalty and advocacy**. When the experience feels easier, customers are more inclined to recommend the brand; when effort increases, NPS tends to decline. The chart highlights this direct relationship, showing that ease of experience is a key lever for improving NPS.

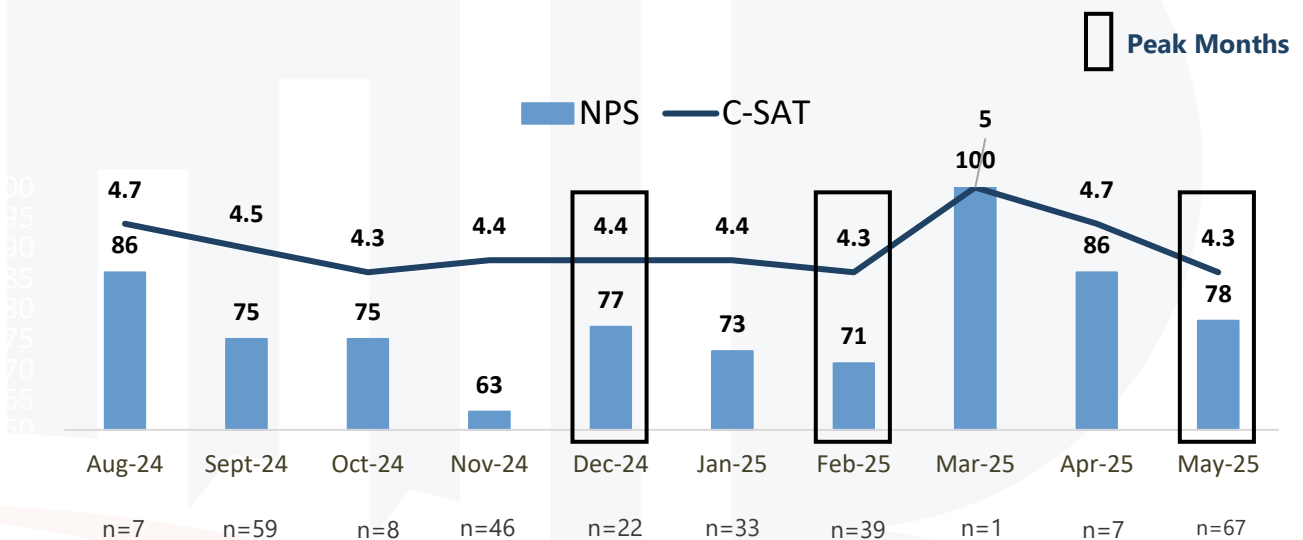


OVERALL EXPERIENCE

ON-SITE

ON-SITE: MoM TREND OF NPS AND C-SAT

C-SAT remained stable across the months, but NPS showed instability. November marked the lowest, causing a Q4 dip. Peak months performed well aside from February. Notably, November, January & February collectively pulled down the overall NPS.



WHAT DOES THIS MEAN?

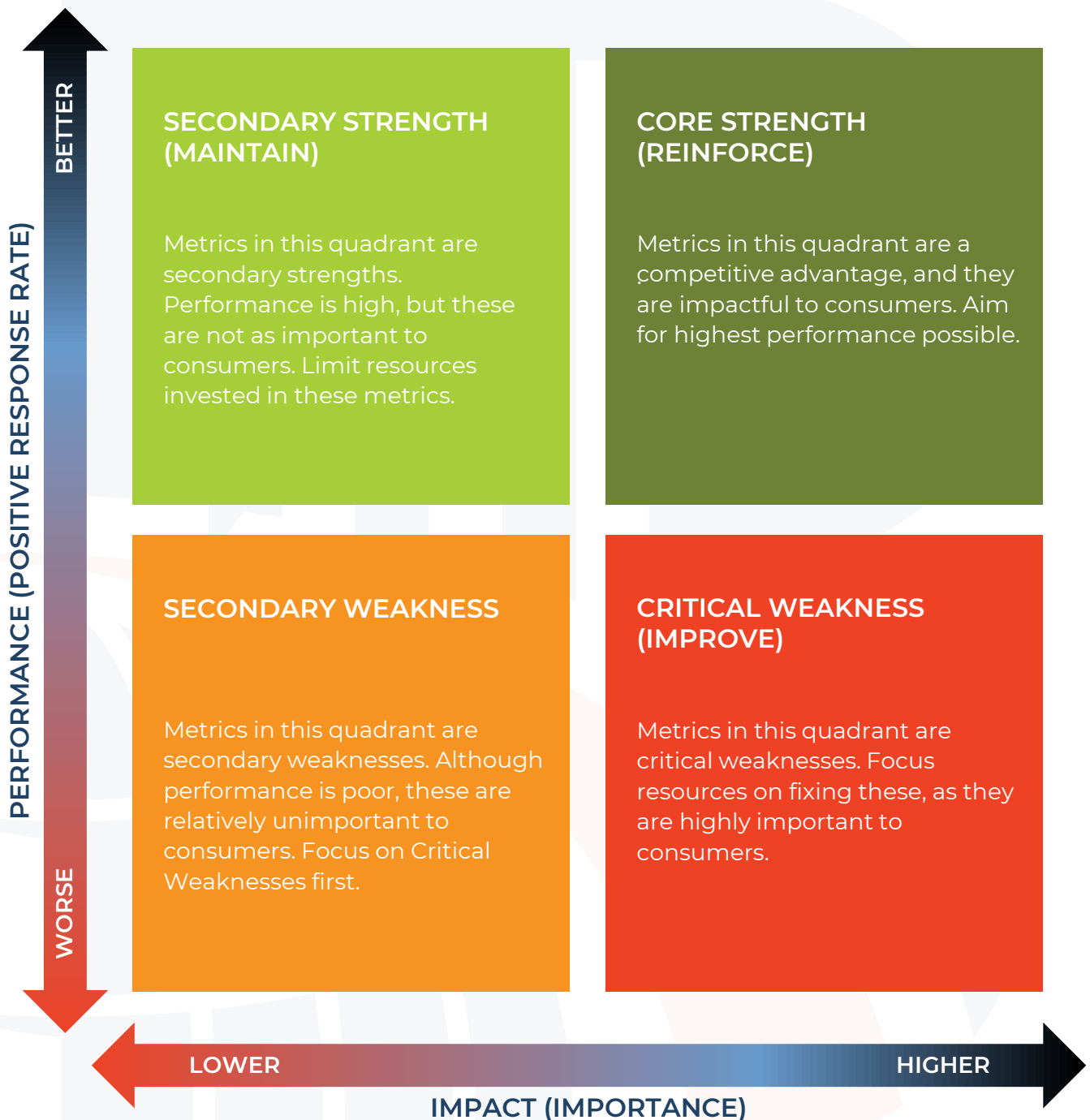
Meaning varies across car wash locations and operations. Typically, a change indicates adjustments—positive or negative—in service quality, affecting customer experience, promotions, and competitiveness. These variations in NPS can also impact overall or location-specific revenue.

In this example, the low-performing periods indicate times when the experience fails to turn satisfaction into loyalty. This illustration shows that focusing improvements during these months offers the best chance to increase overall NPS.



KEY DRIVER ANALYSIS: UNDERSTANDING QUADRANTS

IMPACT OF ALL SECTIONS ON NPS





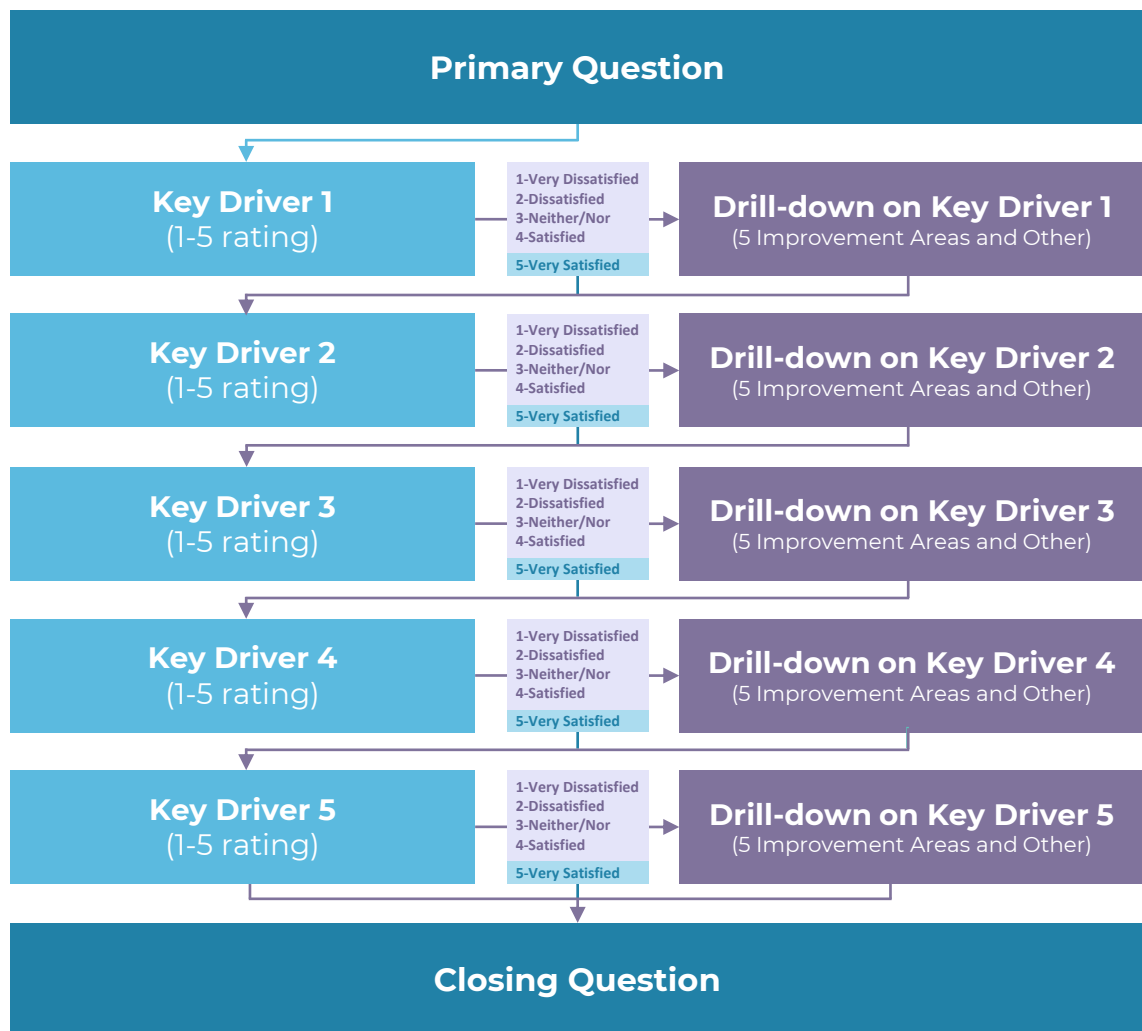
Creating a Starter VoC Survey

Customer feedback is one of the most direct ways to understand how car wash experiences are truly perceived at ground level. From arrival and staff interaction to wash results, pricing perception, and follow-up, structured input from customers highlights the moments that shape satisfaction, repeat visits, and advocacy.

This section focuses on designing a practical Voice of the Customer survey tailored to the car wash journey. It covers how to frame clear, moment-specific questions around service quality, staff performance, value perception, and overall experience; how to apply a simple 1–5 satisfaction scale alongside a loyalty or recommendation indicator; and how to convert feedback into concrete actions that improve consistency, strengthen confidence, and elevate everyday service delivery.

CREATING A STARTER VOC SURVEY

A starter VoC survey can be created by harnessing insights from customer sentiments, thoughts, and feelings expressed in their online reviews and **focusing on the topics customers discuss most frequently.**



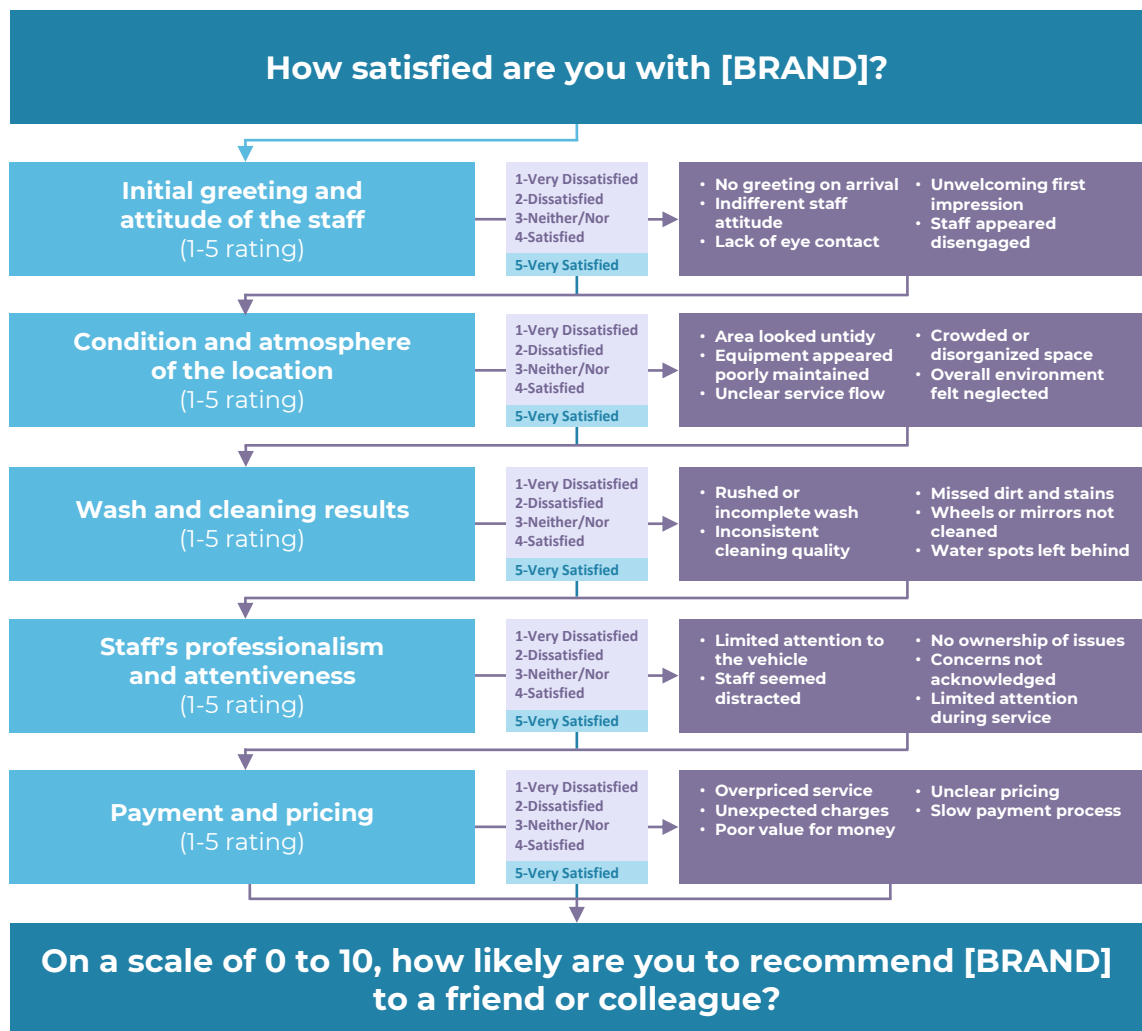
Primary Question: The starting point of the survey, setting the general direction and context. It gathers a quick overall snapshot on the customer's opinion of the brand, company, or product.

Closing Question: The final question posed to the respondent. This can capture valuable insights that might not otherwise fit the general format/structure of the survey.

KEY DRIVER AND DRILL-DOWN QUESTIONS

Primary Question: Rate “How satisfied are you with [BRAND]” on a scale from 1 ('Very Dissatisfied') to 5 ('Very Satisfied')

Closing Question: Evaluate customer retention and advocacy potential, gaining insights into the customer experience.



Key Driver Question: Used to assess user satisfaction on top 5 critical industry topics using a 1-5 scale.

Drill-Down Questions: Respondents not fully satisfied identify their top dissatisfaction factors.

A STARTER VOC SURVEY FOR CAR WASH

Creating a starter Voice of the Customer (VoC) survey based on insights from online customer reviews ensures that the survey is relevant and focused on actual customer experiences. This approach leads to higher engagement and response rates, as it addresses the issues and trends that matter most to customers. Such a survey provides valuable data for prioritizing business strategies and improving customer satisfaction.

The image displays a VoC survey interface on two devices: a desktop monitor and a smartphone. Both screens show the same survey question: "How satisfied are you with [BRAND]? *". Below the question is a 5-point scale with buttons labeled 1, 2, 3, 4, and 5. The button for "4" is highlighted in a blue-to-purple gradient. Below the scale, the text "Very Dissatisfied" is aligned with the "1" button, and "Very Satisfied" is aligned with the "5" button. At the bottom of each screen is a blue-to-purple gradient button labeled "NEXT". A progress bar at the top of each screen indicates that 7% of the survey has been completed.

← 15 %

How satisfied were you with the INITIAL GREETING AND ATTITUDE OF THE STAFF?*

1 2 3 4 5

Very Dissatisfied Very Satisfied

NEXT

← 23 %

What part of the "INITIAL GREETING AND ATTITUDE OF THE STAFF" fell short?*

No greeting on arrival ☐

Indifferent staff attitude ☒

Lack of eye contact ☐

Unwelcoming first impression ☐

Staff appeared disengaged ☐

Other ☐

NEXT

← 30 %

How satisfied were you with the CONDITION AND ATMOSPHERE OF THE LOCATION?*

1 2 3 4 5

Very Dissatisfied Very Satisfied

NEXT

← 38 %

What part of "CONDITION AND ATMOSPHERE OF THE LOCATION" fell short?*

Area looked untidy ☐

Equipment appeared poorly maintained ☐

Unclear service flow ☐

Crowded or disorganized space ☐

Overall environment felt neglected ☒

Other ☐

NEXT

← 46 %

How satisfied were you with the WASH AND CLEANING RESULTS?*

1 2 3 4 5

Very Dissatisfied Very Satisfied

NEXT

← 53 %

What part of "WASH AND CLEANING RESULTS" fell short?*

Rushed or incomplete wash ☐

Inconsistent cleaning quality ☐

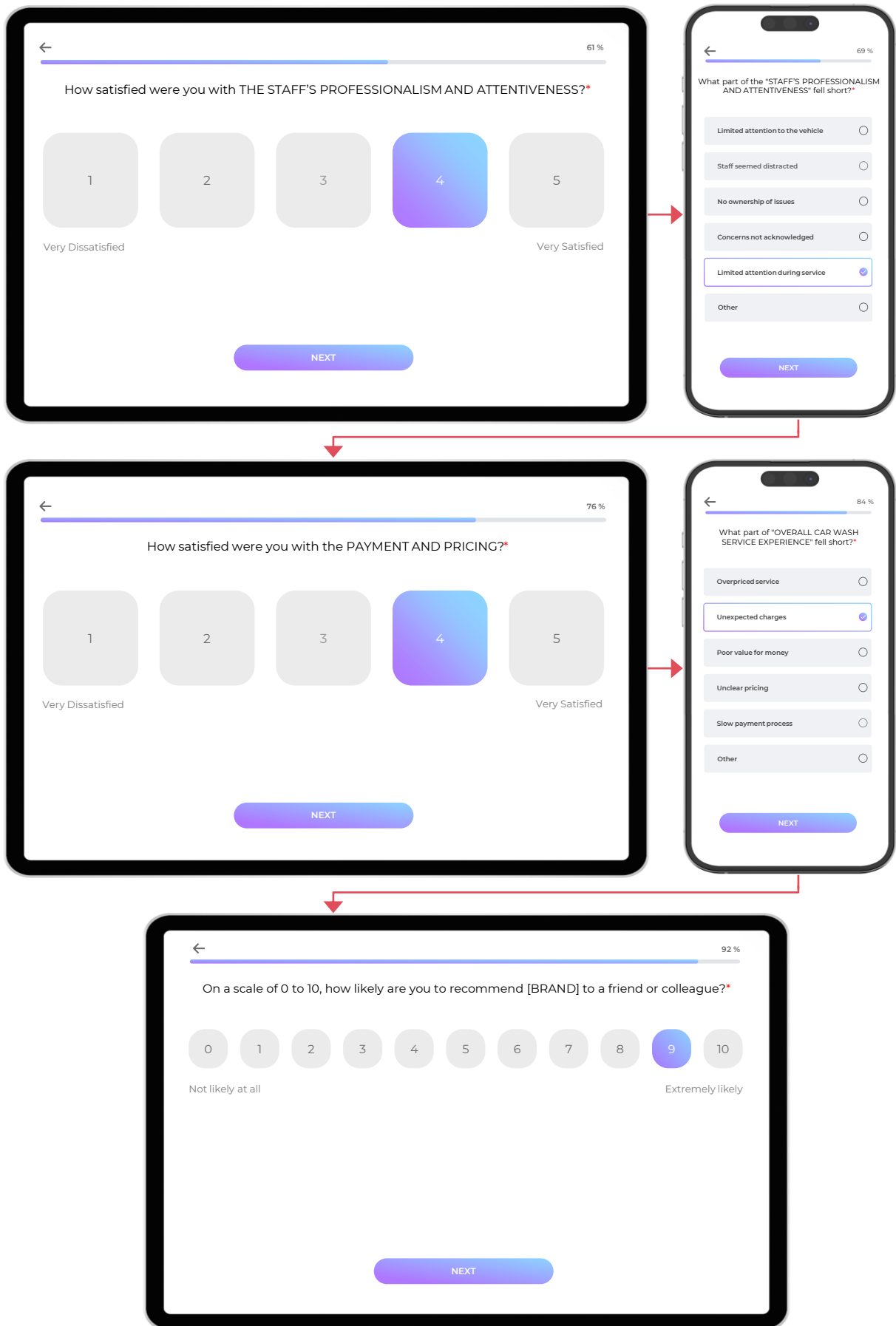
Missed dirt and stains ☒

Wheels or mirrors not cleaned ☐

Water spots left behind ☐

Other ☐

NEXT



VoC SURVEY NEXT STEPS

In this 'starter' VoC survey, we selected the top five key driver questions based on what customers talk about and frequently mention in negative aspects in their online reviews. The drill-down questions were chosen following the same principle.

The VoC Survey Process

	Awareness	Consideration	Conversion	Retention	Advocacy
Product	0.72%	3.32%	19.90%	0.33%	0.69%
People	0.03%	13.63%	9.79%	2.23%	0.88%
Process	0.15%	1.52%	17.43%	3.90%	1.04%
Place	0.20%	0.80%	9.70%	0.07%	0.20%
Price	0.08%	1.18%	8.59%	0.69%	0.25%
Promotion	0.06%	0.11%	0.31%	1.59%	0.60%
Physical Evidence	0.00%	0.00%	0.00%	0.00%	0.00%

Step 1: Data Analysis

We begin by analyzing online reviews and ratings to create a customer response score matrix. The Marketing Mix-Funnel matrix highlights how different Marketing Mix Elements perform across various Customer Journey Stages.

Step 2: Identify Critical Areas

From the Marketing-Mix Funnel, we identify the top five areas showing the most critical feedback, based on their online reviews and ratings scores.

Step 3: Key Drivers

These areas are selected for deeper examination in the VoC survey. They are converted to questions, following the pattern "How satisfied were you with...", used to assess user satisfaction using a 1-5 scale.

Step 4: Key Driver Details

For each key driver, additional questions are designed and visualized if the driver is scored with a 4 or lower. This direct questioning helps to drill down into the exact reasons behind the customer negative experiences.

Step 5: Data Collection

The VoC survey is distributed, and data is collected.

Step 6: Actionable Insights

The collected data reveals specific aspects that negatively affect the overall customer perception of the brand. With this detailed insight, the company can directly target improvements in the critical areas to enhance the customer experience and improve brand reputation.

NOTE: It is up to the CX professional to selectively fine-tune and adjust the key drivers and appropriate drill-down questions, considering the specific needs and objectives of the business.

INITIAL GREETING AND ATTITUDE OF THE STAFF

The first moments at a car wash location play a critical role in shaping customer perception. A simple greeting, visible staff presence, and a welcoming attitude signal professionalism and care before the service even begins. This initial interaction sets expectations for the visit and strongly influences how customers judge the quality and reliability of everything that follows.

The top 5 key driver details, followed by an additional 10, offer detailed insight into areas where the **INITIAL GREETING AND ATTITUDE OF THE STAFF** key driver may fall short.



Top 5 Key Driver Details

- No greeting on arrival
- Indifferent staff attitude
- Lack of eye contact
- Unwelcoming first impression
- Staff appeared disengaged

Additional Key Driver Details

- No acknowledgment
- Rushed behavior
- Cold interaction
- No guidance offered
- Task-focused only
- No smile or nod
- Avoided interaction
- No proactive help
- Impersonal approach
- Emotionless response

CONDITION AND ATMOSPHERE OF THE LOCATION

The physical condition of a car wash location immediately signals service standards to customers. Cleanliness, organization, and well-maintained equipment create confidence that the service will be handled with care and precision. When the environment feels neglected or confusing, customers quickly question quality, safety, and value – often before the wash even begins.

The top 5 key driver details, followed by an additional 10, offer detailed insight into areas where the **CONDITION AND ATMOSPHERE OF THE LOCATION** key driver may fall short.

Top 5 Key Driver Details

- Area looked untidy
- Poorly maintained equipment
- Unclear service flow
- Crowded or disorganized space
- Neglected overall environment

Additional Key Driver Details

- Poor lane organization
- Dirty or cluttered bays
- Broken/malfunctioning equipment
- Slippery or unsafe surfaces
- Confusing signage
- Unclean vacuum stations
- Trash not cleared
- Worn or damaged facilities
- Strong chemical or stale odors
- Damaged facilities



WASH AND CLEANING RESULTS

The wash and cleaning outcome is the core moment by which customers judge the service. Regardless of speed, pricing, or convenience, the final condition of the vehicle determines whether the visit feels worthwhile. Attention to detail, consistency, and visible results all shape confidence that the service delivered on its promise.

The top 5 key driver details, followed by an additional 10, offer detailed insight into areas where the **WASH AND CLEANING RESULTS** key driver may fall short.



Top 5 Key Driver Details

- Rushed or incomplete wash
- Inconsistent cleaning quality
- Missed dirt and stains
- Wheels or mirrors not cleaned
- Water spots left behind

Additional Key Driver Details

- Residue left on windows
- Interior still dirty
- Streaks on paintwork
- Foam not fully rinsed
- Missed areas around doors
- Poor drying finish
- Brush marks visible
- Uneven cleaning across the car
- Quick pass through the tunnel
- Uneven shine after wash

STAFF'S PROFESSIONALISM AND ATTENTIVENESS

During the wash and cleaning process, staff professionalism and attentiveness signal how much care is being taken with the customer's vehicle. Clear focus, proactive communication, and visible responsibility help build confidence that the service is being handled properly. When attention slips or engagement feels minimal, customers quickly question service quality and reliability.

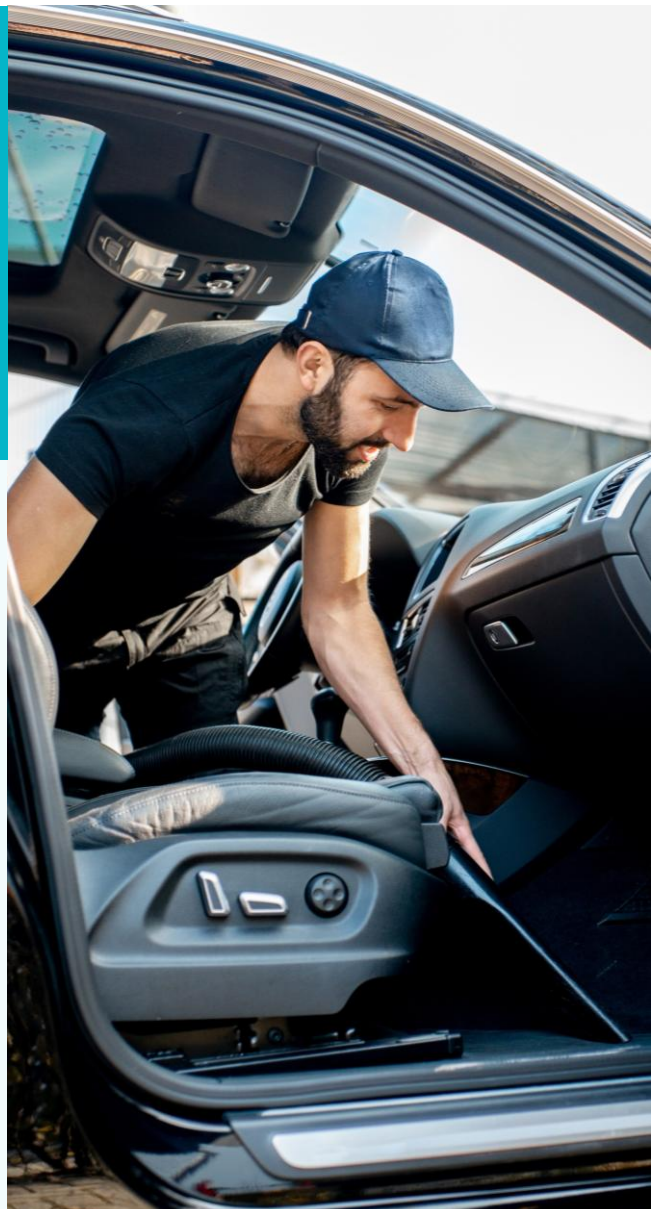
The top 5 key driver details, followed by an additional 10, offer detailed insight into areas where the **STAFF'S PROFESSIONALISM AND ATTENTIVENESS** key driver may fall short.

Top 5 Key Driver Details

- Limited attention to the vehicle
- Staff seemed distracted
- No ownership of issues
- Concerns not acknowledged
- Limited attention during service

Additional Key Driver Details

- Staff rushed through tasks
- Lack of focus on details
- Minimal staff presence
- No proactive communication
- No or slow response to requests
- Tasks handled carelessly
- Staff avoided interaction
- Unclear responsibility on site
- Service felt inattentive
- Little visible supervision



PAYMENT AND PRICING

Payment and pricing are decisive moments where customers evaluate fairness, transparency, and overall value. Clear pricing, smooth transactions, and predictable charges reinforce trust, while confusion or delays quickly undermine satisfaction. Even when the service itself meets expectations, issues at payment can leave a lasting negative impression.

The top 5 key driver details, followed by an additional 10, offer detailed insight into areas where the **PAYMENT AND PRICING** key driver may fall short.



Top 5 Key Driver Details

- Overpriced service
- Unexpected charges
- Poor value for money
- Unclear pricing
- Slow payment process

Additional Key Driver Details

- Prices not clearly displayed
- Confusing price differences
- Slow check-out process
- Payment felt inefficient
- Limited payment options
- Price higher than expected
- Charges did not match service
- Checkout felt disorganized
- Long wait to pay
- Value did not justify cost

BEYOND THE STARTER TWO MORE KEY DRIVERS

Our Starter Voice of the Customer (VoC) survey for car wash services also highlights two often under-prioritized drivers: **Information Available When Researching Services** and **Follow-Up Communication**. These stages frame the experience before and after the wash itself – shaping expectations upfront and influencing whether customers feel valued once the service is complete.

Clear, accessible information helps customers make fast, confident decisions about where to wash, what service to choose, and what to expect in terms of pricing, duration, and results. After the visit, thoughtful follow-up – such as reminders, loyalty updates, or simple acknowledgments – reinforces trust and keeps the brand top of mind in a high-frequency, routine-based service.

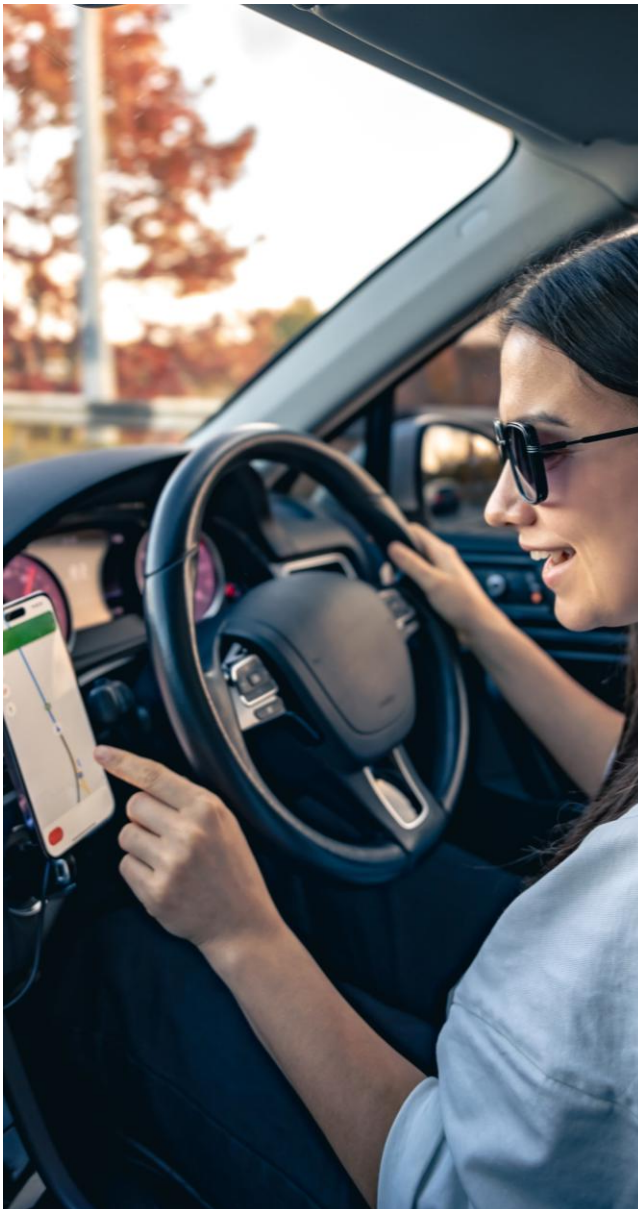
By strengthening how information is presented before the visit and how communication continues afterward, car wash operators can close critical gaps beyond the wash bay. When customers feel informed, remembered, and appreciated, they are far more likely to return regularly, enroll in loyalty programs, and recommend the service as part of their everyday routine.



INFORMATION WHEN RESEARCHING

Before choosing a car wash, customers rely on clear and accessible information to make quick, confident decisions. Availability of service details, pricing, locations, and options - both online and on-site, all shape expectations before arrival. When information is incomplete or hard to find, uncertainty carries into the visit and affects overall satisfaction.

The top 5 key driver details, followed by an additional 10, offer a detailed insight into areas where the **INFORMATION WHEN RESEARCHING** key driver may fall short.



Top 5 Key Driver Details

- Limited information available
- Unclear service descriptions
- Pricing not clearly explained
- Missing details online
- Confusing service options

Additional Key Driver Details

- Outdated information
- Inconsistent details across channels
- No clear comparison of services
- Lack of photos or visuals
- Benefits not explained
- Hard to find key information
- Poor website usability
- No clear explanation of add-ons
- Incomplete location details
- Information felt unreliable

FOLLOW-UP COMMUNICATION

Follow-up communication extends the experience beyond the wash itself. Reminders, loyalty messages, and relevant updates help maintain engagement and reinforce value over time. When these elements are missing or poorly executed, customers may feel disconnected, weakening retention and repeat visits.

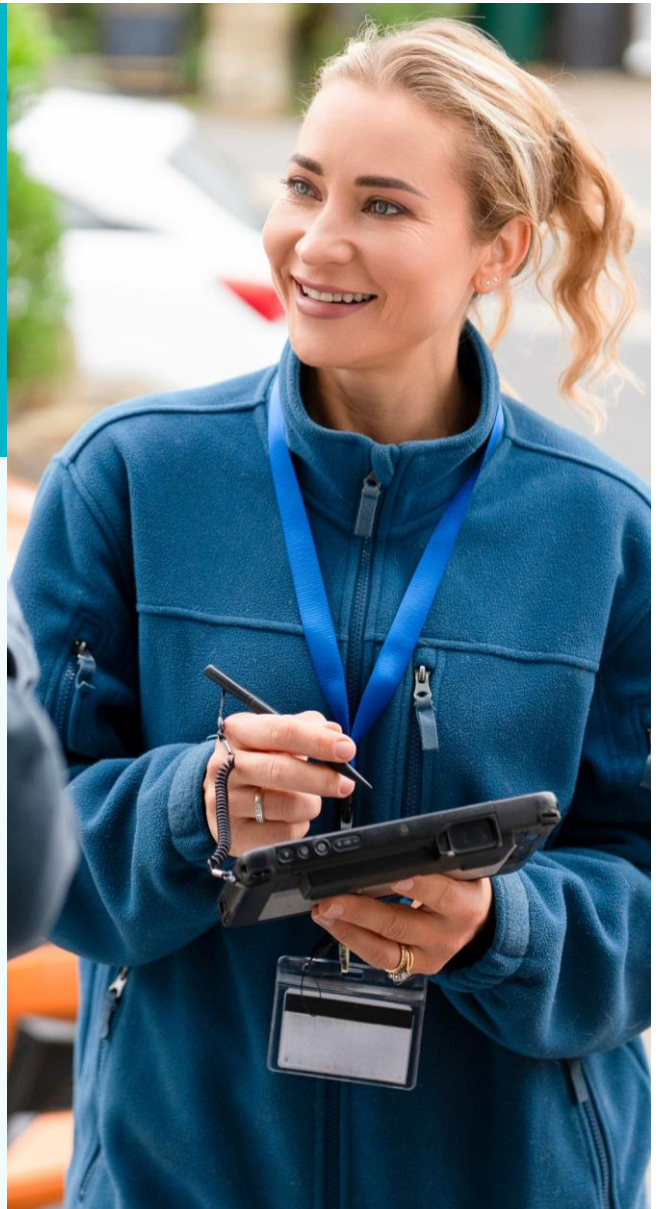
The top 5 key driver details, followed by an additional 10, offer insight into areas where the **FOLLOW-UP COMMUNICATION** key driver may fall short.

Top 5 Key Driver Details

- No follow-up after the visit
- No reminder for the next wash
- Loyalty benefits not communicated
- Feedback request never received
- No confirmation of service

Additional Key Driver Details

- Loyalty program not explained
- Rewards status unclear
- No points or benefits update
- Reminders felt irrelevant
- Follow-up messages arrived too late
- No personalized communication
- Missed opportunity to re-engage
- Promotions not communicated
- No incentive to return
- Follow-up felt impersonal



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WHEN BEST-IN-CLASS IS NOT ENOUGH

Why precision and consistency define experience in “need-to” services



Not everything in customer experience deserves a TED Talk. Not every journey is aspirational, emotional, or designed to inspire excitement. Yet some of the strongest drivers of loyalty are built precisely in those experiences customers do not seek out, but simply need to work.

This is where the **Principle of Accuracy** becomes fundamental to customer experience design.

One of the enduring complexities of customer experience and customer research is not only the diversity of customer profiles and needs, but the fact that **expectations shift significantly depending on the industry and the role the experience plays in a customer's life**. What customers value, tolerate, or forgive in one context may be entirely unacceptable in another.

It is true that customers increasingly compare experiences across industries. Best-in-class organizations set standards that extend beyond their own category, shaping expectations around convenience, usability, speed, and personalization. These benchmarks influence how customers assess every interaction.

What does not transfer in the same way, however, is the **emotional relationship customers have with the experience itself**.

Buying shoes, choosing a new piece of technology, or selecting products linked to identity or aspiration can be engaging experiences. These are discretionary interactions, where customers are willing to explore options, invest time, and accept a degree of variation as part of the process. In such contexts, value is often created through choice, discovery and perceived relevance; not only through flawless execution.



In experiences that are a necessity rather than a choice, excellence is not about delight; it is about getting it right, every single time.

Not everything deserves a TED Talk.

The same is not true for many service categories, particularly **repetitive, functional, or maintenance-driven services**. Taking a car to the car wash, even for someone who enjoys cars, does not generate excitement. It is not something customers look forward to; it is something they need to get done.

Customers do not wake up thinking, “*I want to have my car washed today.*” They think, “*I need to have my car washed.*”

That distinction is critical.

Take insurance claims as an example. No customer enters the process in a positive emotional state. The very reason for engagement is usually stress, loss, or inconvenience. In this context, friendly language or brand storytelling cannot compensate for delays, unclear communication, or inconsistent decisions. What builds trust is accuracy, transparency, and follow-through.

The same applies to utilities or telecom services. Customers may appreciate digital channels, self-service options, and modern interfaces, but these elements only add value if the core service is stable. A beautifully designed app cannot offset repeated billing errors or unresolved outages. In fact, it often amplifies frustration by raising expectations that the organization then fails to meet.

Even in healthcare, where empathy is critical, **process reliability remains the foundation of experience quality**. Appointment accuracy, waiting times, clear instructions, and coordinated information flows often matter more to patients than polished environments or advanced technology.

These industries share a common characteristic: **the cost of getting it wrong is disproportionately high**, while the reward for getting it right is often silent. Customers rarely praise these services when they function properly, but they remember failures vividly and for a long time.



This creates a dangerous trap for organizations. Because success feels invisible, investment is often diverted toward visible innovation rather than operational discipline. Yet customer research repeatedly shows that in “need-to” services, **consistency outperforms creativity**.

Research shows, for instance, that the main reason customers do not have their car washed more often is not because of its cost, but because they do not have the time.

In these “need-to” experiences, the emotional baseline is neutral at best and often slightly negative before the interaction even begins. Time is limited. Patience is thin. There is little tolerance for friction, ambiguity, or error. In this context, **accuracy is not a hygiene factor – it is the experience**.

Accuracy means delivering exactly what was promised. The process is predictable. The outcome is consistent. The timing is respected. The service works the first time, without requiring explanation, escalation, or additional effort. Precision, intentional design, and consistency across touchpoints matter more here than novelty or surprise.

In such services, loyalty is not earned by standing out, but by not standing in the customer’s way. Organizations that master accuracy build trust quietly, through repetition. They understand that for experiences customers do not actively choose out of want, value is created by reliability, not memorability; and that sustainable performance comes from respecting what customers truly need in moments they would rather simplify or avoid altogether.



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WITH THE PROFESSIONALS

WHO WE ARE

MSPA is the representative Trade Association for companies involved in the Mystery Shopping industry. The Association operates on a regional basis worldwide, with chapters located in America, Europe/Africa and Asia/Pacific. Member companies unite as a common body for the purpose of strengthening the Mystery Shopping industry through combined efforts and actions.



OUR GOAL

Our goal is to improve and stimulate the acceptance, performance, reputation and use of Mystery Shopping services worldwide.

The primary goals of MSPA are to:

- Establish professional standards and ethics for the industry
- Educate providers, clients and shoppers to improve quality of service
- Improve the image of the industry through public relations and professional conduct
- Promote members to other industry associations and prospective clients



With over 450 member companies worldwide, our diverse membership includes marketing, research and merchandising companies, private investigation firms and training organisations as well as companies that specialise in using, supporting and providing Mystery Shopping services.

INTERESTED IN JOINING US?

Find out more www.mspa-ea.org

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THE BENEFITS OF MSPA MEMBERSHIP

- Work to industry standards by adhering to our code of ethics
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- Access to the latest news on industry trends and guidance on best practice
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- Discounts on all worldwide MSPA conferences
- Access to education workshops and learning modules for your employees



MEMBERSHIP OPPORTUNITIES

MSPA FULL MEMBERSHIP

As a full member you'll have an unlimited opportunity to connect, learn and share with the industry leaders in Mystery Shopping techniques and working practices. Full membership costs € 550 per year and provides you with access to all the benefits that MSPA has to offer, including the members area of the website which contains useful features such as our Knowledge Centre, FAQ, Hints & Tips, 'Ask the Governor' Q&A and Jobs Board.



MSPA CANDIDATE MEMBER

CANDIDATE MEMBERSHIP

We recognise that some companies that are new to the Mystery Shopping industry still need our support to grow their client base. Therefore, we offer Candidate membership to companies that have been trading for less than 2 years but meet all other criteria, at a cost of € 325 per year. Candidate Members are encouraged to participate fully in MSPA activities and may progress to Full Membership in the future.



MSPA ASSOCIATE MEMBERSHIP

MSPA offers Associate Membership to companies or individuals involved in the industry, but who don't directly offer Mystery Shopping services. Associate Members include technology vendors, academics, training companies, HR agencies and other companies that cooperate with or sell products/services to Mystery Shopping providers. This category of membership costs € 550 per Year.



All MSPA membership applicants need to provide proof that they operate professionally and with integrity before they are accepted into our organisation. More detailed information on member benefits and criteria for each membership category can be found on our website, however as a minimum you must be able to demonstrate:

- A reputation for excellence in operation
- Agreement to abide by and to apply the MSPA Code of Professional Ethics
- Agreement to abide by and to apply the MSPA Code of Professional Standards
- Official proof of business existence (i.e. articles of incorporation, insurance records, or business license)





Photo credit: Forbes Portugal

Legacy, Leadership, and the Human Advantage in a Digital World

CX Channel at Forbes Summit

The CX Channel was present at the Forbes Annual Summit, marking the **10th anniversary of Forbes Portugal**. The occasion was not only a celebration of a decade of business journalism, but a moment of collective reflection on what organizations leave behind and what kind of leadership is required to shape what comes next.

The concept of **legacy** ran as a unifying thread throughout the summit. Not legacy as reputation alone, but legacy as the cumulative impact of decisions, behaviors, and priorities sustained over time. In a business context increasingly defined by speed, volatility, and constant reinvention, this focus felt both timely and necessary.

What emerged clearly is that legacy is no longer built through scale or visibility alone. It is built through **relevance, responsibility, and the ability to translate strategy into lasting value**.

This perspective resonates strongly with the conversations we have been advancing throughout the CX Channel. Customer experience, like leadership, cannot be reduced to isolated initiatives or short-term wins. It requires intentional design, disciplined execution, and a long-term view of impact: on customers, employees, and the organization as a whole.

A recurring theme at the summit was the evolution of leadership itself. Traditional hierarchies are giving way to more fluid, cross-functional roles, where influence is exercised through alignment rather than authority. Emerging leadership profiles are expected to **bridge strategy and execution, technology and people, vision and accountability.**

This shift has direct implications for customer experience management. CX is inherently transversal. It does not belong to a single department, nor can it succeed as a standalone program. It demands leaders who can navigate complexity, align teams, and prioritize initiatives that deliver real business impact.

Another powerful dimension of the summit was the emphasis on the human aspect of business, explored through both leadership dialogue and the presence of art as a driving force. Art was not positioned as decoration, but as expression, an embodiment of perspective, emotion, and meaning. In doing so, it reinforced a critical message: while technology has become globally accessible and increasingly commoditized, **human judgement, creativity, and talent remain the true differentiators.**



Photo credit: Forbes Portugal

In a digital market where advanced tools, platforms, and AI capabilities are available worldwide, competitive advantage no longer lies in access to technology alone. It lies in how organizations empower teams to make better decisions, interpret insight with context, and act with intent.

This is particularly relevant for customer experience strategies. Data, automation, and AI can amplify performance, but they do not replace the need for human understanding. Insight without interpretation remains inert. Technology without purpose risks becoming noise. The organizations that stand out are those that invest not only in systems, but in **capability, culture, and accountability**.

The summit's focus on legacy also serves as a reminder that impact is measured over time. Short-term optimization may deliver results, but sustainable growth is built through

consistency, trust, and coherence between what organizations say and what they do. Customer experience plays a central role in that equation, because it is where strategy becomes tangible.

For CX leaders, the message is pragmatic. Progress does not come from bold statements alone, but from the ability to make disciplined choices: where to invest, what to prioritize, and which initiatives genuinely move the organization forward. Innovation matters, but only when it is matched by execution. Technology enables scale, but it is human judgement that gives it direction.

The conversations sparked at this summit underline an essential truth for our community: **legacy is not declared – it is earned** – through the quality of leadership decisions, the integrity of execution, and the human values organizations choose to protect, even as the business landscape continues to evolve.

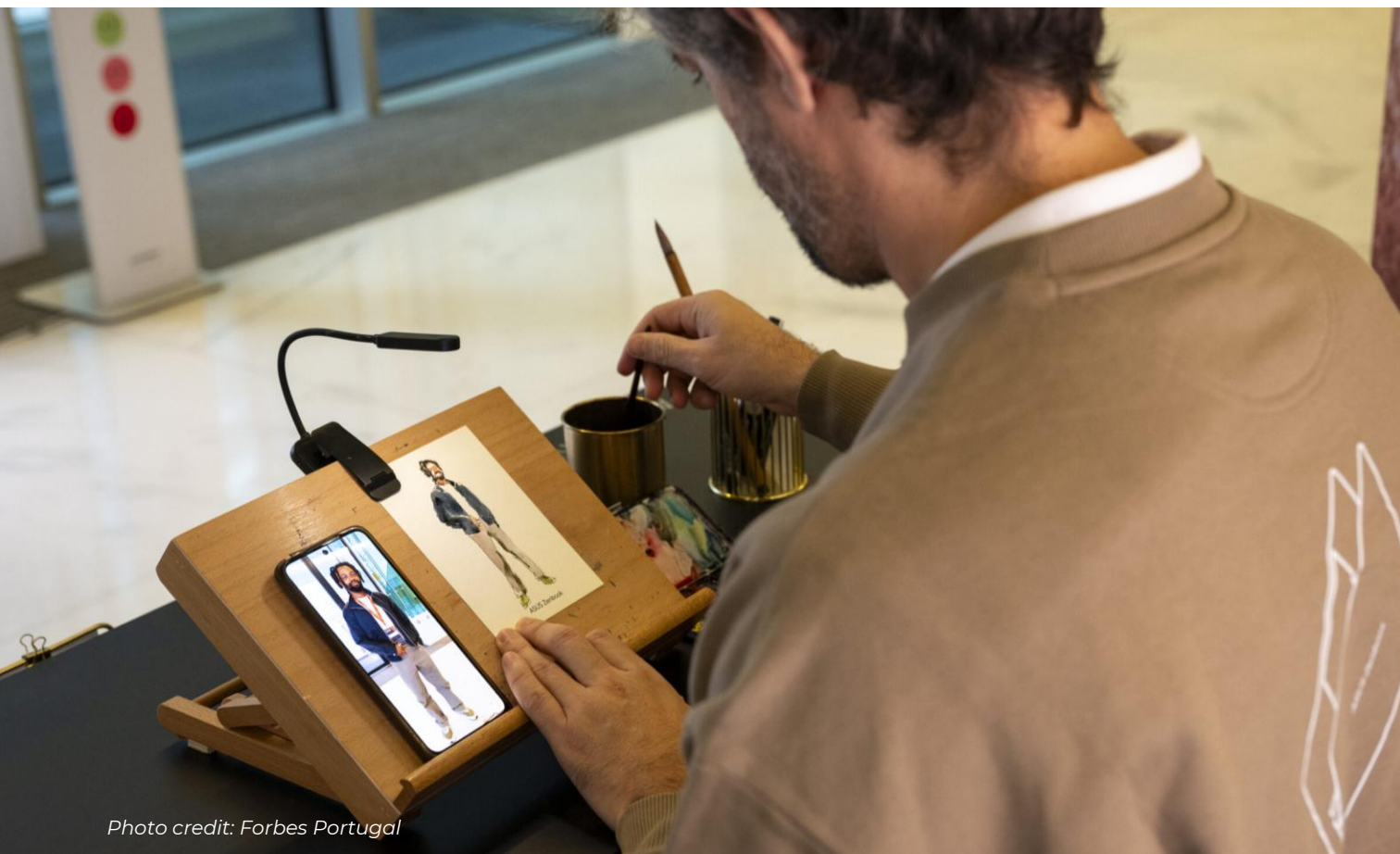


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