The Touchpoint Inventory

BLANK WORKSHEET **Brand:** _____ **Date:** _____ **By:** _____

A complete list of every message your customers receive, who owns it, and the job it does. You cannot design an experience you have not counted.

WHAT IT IS
A single list of every automated and manual message: flows, campaigns, transactional emails, texts and replies. Most brands find messages nobody remembers owning.

HOW TO USE IT
1. Export your flows and campaigns. 2. Add transactional messages from your store platform. 3. Fill one row per message. 4. Mark overlaps and gaps. 5. Retire or fix what has no job.

WHERE MESSAGES HIDE
Store platform order emails, support tool auto-replies, subscription billing notices, review app requests, loyalty app messages and old flows nobody turned off.

The five questions for every message

WHY DOES IT EXIST?	WHO GETS IT?	WHEN DOES IT ARRIVE?	WHAT SHOULD HAPPEN NEXT?	WHO OWNS IT?
One clear job.	One defined audience.	A trigger or a date.	One next step.	A named person.

If a message cannot answer all five, it is a candidate to fix or retire.

Message inventory

One row per message. Include automated and manual, marketing and transactional. Add rows as needed.

MESSAGE	TRIGGER OR SEND RULE	STREAM	JOB IT DOES	OWNER	STATUS

Gaps and overlaps

Walk the customer's path and check there is one message, not zero and not three, for each moment.

MOMENT	MESSAGES TODAY	GAP OR OVERLAP?	WHAT TO DO	OWNER

Action plan and review rhythm

Turn what you found into a short list. Fix the highest impact items first, and give every item an owner and a date.

#	ACTION	LINKED FINDING	EFFORT	IMPACT	OWNER	DUE
1						
2						
3						
4						
5						

Review rhythm

MONTHLY
Add new messages the week they launch. Mark anything retired.

QUARTERLY
Walk the whole inventory. Check every owner is still right.

AFTER ANY CHANGE
New platform, new store app, or new flow: update the list first.

Next: use the Message Check on every message that has a job but weak results.