

Where a ready customer quietly stops

A customer-journey test for owner-led Swiss service and trade SMEs

Find one moment where a willing customer could become uncertain enough to wait.

You will finish with one concrete friction point, the evidence to collect and the smallest response worth testing.

ONE REAL BUYING EXPERIENCE

I had a problem before I had a product request

I live on the ground floor in Basel, close to a small forest. During the recent hot weather, I was seeing many more mosquitoes and other insects around my apartment. I had a concrete problem and wanted it solved. The practical solution I started looking for was fitted insect screens.

The buying process became a second problem. I am an expat, and the available information did not fit the language I was most comfortable using. The journey kept pushing me toward a phone call. Even with fluent German, calling would still have been inconvenient because I needed to find time between meetings and explain a problem when I did not yet know which product or configuration I needed.

I could not tell when or how someone would answer, whether the response would become another phone call, or whether asking for a quote would be treated as a commitment before I understood the options. I delayed the purchase.

USER-CONFIRMED EXPERIENCE

This proves that one ready buyer delayed. It does not establish how common the experience is or quantify market-wide revenue loss.

What Sofortli is

I used this buying problem to shape Sofortli, a working demonstration I built with Codex for Swiss insect-screen and blinds businesses. It shows guided options, a sample guide price, a choice of how to continue, an appointment request and a structured sample enquiry for the business.

WHAT IT PROVES

The proposed journey can be demonstrated and tested. Customer adoption, price rules, integrations and commercial impact still require validation.

COMMERCIAL LOGIC BEFORE AI

Start with the customer and the result

This is a customer and sales exercise before it is a technology exercise. The foundation remains familiar: understand the problem, map the journey, find the friction, collect evidence and define what should improve.

1

Customer problem

What outcome is the person trying to achieve?

2

Customer situation

What do they know, lack or need in order to continue?

3

Public journey

What route can they actually take today?

4

Friction

Where does uncertainty, waiting or forced contact appear?

5

Evidence and outcome

What can confirm the issue, and what should improve?

6

Chosen response

Use information, automation or AI according to the job.

THE REMOVE-AI TEST

If the customer problem and intended result stop making sense when the word AI is removed, the case is not ready.

Choose one customer situation

The customer needs help with

This customer knows

This customer does not yet know

This customer needs to continue by

START AS THE CUSTOMER

Begin with the problem, not the product

Open the public route on your phone. Do not use internal product knowledge, saved links or terminology that a new customer would not have.

Choose one public starting point

- ☐ Website
- ☐ Google Business Profile or public directory
- ☐ Social profile
- ☐ Public enquiry form
- ☐ Another public route

Can this customer recognise that your business solves the problem?

- ☐ Yes, without knowing the product name
- ☐ Only after learning specialist terminology
- ☐ No clear route is visible

What words does the public journey expect the customer to understand?

What is the first action the customer is asked to take?

What does the customer know now about the service, next step and expected response?

MARK THE OBSERVABLE MOMENTS

Where could uncertainty enter?

Language fit

- ☐ The customer can understand the service comfortably.
- ☐ Important product terms need explanation.
- ☐ The customer must switch language or channel.
- ☐ A problem-only description still leads somewhere useful.

What exactly could make the customer pause?

Forced calling

- ☐ The customer can continue without calling.
- ☐ Calling is the only clear next step.
- ☐ Availability is not visible.
- ☐ The customer must explain a problem before knowing what to request.

What exactly could make the customer pause?

Response uncertainty

- ☐ The next step after an enquiry is explained.
- ☐ A realistic response expectation is visible.
- ☐ A test submission receives clear confirmation.
- ☐ The customer knows whether the reply will be written or by phone.

What exactly could make the customer pause?

Quote and commitment

- ☐ Guidance is available without an implied commitment.
- ☐ The information needed for a useful response is clear.
- ☐ A quote, consultation or visit is explained as binding or non-binding.
- ☐ The customer can understand options before deciding.

What exactly could make the customer pause?

CHOOSE AND TEST

One friction point, then one evidence plan

STEP 3 | CHOOSE ONE FRICTION POINT

Write an observable customer moment. Name the screen, question, missing answer or required action.

A willing customer could pause when

because

Required precision

- The product page ends with a phone number and gives no written route.
- The form says request a quote and does not explain whether it is free or non-binding.
- The confirmation says we will contact you and gives no response expectation.

STEP 4 | NAME THE EVIDENCE TO COLLECT

- ☐ Questions customers repeatedly ask before requesting a quote
- ☐ Enquiries that lack information needed for a useful first response
- ☐ Time between an enquiry and the first human response
- ☐ Questions about whether a quote, consultation or visit is binding
- ☐ Test submissions that receive no clear confirmation
- ☐ Customer interviews about why they waited

Another observable trace

CHOOSE THE RESPONSE

Make the smallest useful change or test

Use clearer information when information is missing. Use ordinary automation for a predictable confirmation or status message. AI becomes useful only when it performs a specific job that involves variation, interpretation or synthesis.

Approved-language guidance

Answer service questions across the languages the business has approved.

Guided free-text capture

Turn the customer's own words into the details needed for a useful response.

Structured enquiry summary

Organise mixed details into a clear dossier for the owner.

Option guidance

Help the customer understand available choices before a consultation or visit.

AI does not own the commercial diagnosis. The person accountable for the result defines what should improve; technology and IT provide the implementation expertise.

The smallest response I will test after reviewing the evidence

Why this response matches the exact friction

The person who owns the next step

KEEP THIS PAGE

The customer moment worth investigating

The customer problem

The customer situation the journey needs to handle

The point where a willing customer could pause

The evidence I will collect

The smallest response I will test after reviewing the evidence

The person who owns the next step

WHAT HAPPENS NEXT

Keep this page and collect the evidence you named. Revisit the journey after you have reviewed it and record what the evidence confirms, what it challenges and which small response is worth testing first. Continue with the weekly method at theclosedgap.com.

PUBLIC DISCLOSURE

Any Sofortli screen, person, company, enquiry, price or result shown publicly must be labelled DEMO or SAMPLE DATA. A demo does not establish customer use or measured impact. Source code, pricing formulas, ROI assumptions, the full dashboard, prospect lists, integration architecture and the outreach playbook remain private.