



Customer Experience (CX) Program Rollout Project Checklist Template 2026

Phase 1: Project Discovery & Strategic Alignment

Defining business objectives, identifying key stakeholders, and aligning the CX program with overall corporate goals and KPIs.

Project Name

Write something...

Project Vision & Objectives

Write something...

Key Stakeholders

- ☐ Executive Sponsors
- ☐ Product Management
- ☐ Customer Support Leads
- ☐ Marketing Department
- ☐ IT/DevOps
- ☐ Sales Operations

Project Kickoff Date

Enter date...

Project Priority Level

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

Business Case Documentation

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Customer Journey Mapping & Research

Conducting ethnographic research, analyzing current touchpoints, and identifying friction points within the existing customer lifecycle.

Target Customer Persona Name

Write something...

Identified Customer Pain Points

Write something...

Customer Touchpoints Analyzed

- ☐ Social Media
- ☐ Email
- ☐ In-App/Website
- ☐ Customer Support Call
- ☐ Physical Store/Office

Research Completion Date

Enter date...

Final Journey Map Document

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Voice of the Customer (VoC) Program Setup

Designing survey instruments (NPS, CSAT, CES), selecting feedback channels, and establishing data collection methodologies.

Survey Channels to Implement

- ☐ Email Surveys
- ☐
- ☐ SMS/Text Surveys
- ☐ Post-Call IVR
- ☐ Social Media Listening

Primary CX Metric Focus

- ☐ Net Promoter Score (NPS)
- ☐ Customer Satisfaction Score (CSAT)
- ☐ Customer Effort Score (CES)
- ☐ Customer Retention Rate

Survey Frequency Schedule

Write something...

Target Audience Segmentation Criteria

Write something...

VoC Program Launch Date

Enter date...

Survey Design Prototypes/Drafts

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Technology & Tool Integration

Evaluating and deploying CRM, CCaaS, and CX management software, ensuring seamless data flow between departmental systems.

Required Software Systems

- ☐ CRM (Customer Relationship Management)
- ☐
- ☐ Ticketing/Helpdesk System
- ☐ Data Analytics Dashboard
- ☐ Customer Data Platform (CDP)

Integration API Status

Write something...

System Deployment Deadline

Enter date...

Technical Architecture Diagram

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Integration Complexity Level

- ☐ Low (Plug-and-Play)
- ☐ Medium (Custom Configuration)
- ☐ High (Custom API Development Required)

Data Security & Compliance Notes

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Process & Service Blueprinting

Designing standardized service protocols, escalation workflows, and cross-departmental communication loops for seamless delivery.

Primary Service Blueprint Name

Write something...

Customer Touchpoints Included

- ☐ Digital (Web/Mobile)
- ☐
- ☐ Email/Direct Marketing
- ☐ In-Person/Retail
- ☐ Customer Support (Phone/Chat)

Critical Friction Points Description

Write something...

Complexity Level

- ☐ Low
- ☐ Medium
- ☐ High

Finalized Blueprint Document

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Blueprint Approval Date

Enter date...

Internal Training & Change Management

Developing training modules for frontline staff, communicating new CX values to the organization, and managing cultural shifts.

Training Completion Deadline

Enter date...

Targeted Departments for Training

- ☐ Customer Support
- ☐ Sales & Account Management
- ☐ Marketing
- ☐ Product Development
- ☐ Operations

Training Curriculum/Manual

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Change Management Strategy Summary

Write something...

Training Delivery Method

- ☐ Instructor-Led Workshop
- ☐ E-Learning Module
- ☐ On-the-Job Coaching
- ☐ Webinar/Virtual Session

Program Lead Approval

Pilot Program Implementation

Launching the CX initiative in a controlled environment or specific segment to test efficacy and identify operational gaps.

Pilot Program Scope Definition

Write something...

Pilot Start Date

Enter date...

Pilot End Date

Enter date...

Pilot Success Metric

- ☐ NPS Improvement
- ☐ Reduced Churn Rate
- ☐ Increased CSAT Score
- ☐ Reduced Average Handling Time (AHT)

Testing Channels

- ☐ Email
- ☐ Live Chat
- ☐ Phone Support
- ☐ Social Media
- ☐ In-App Messaging

Pilot Test Results Report

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Project Sponsor Approval



Full-Scale Rollout & Deployment

Executing the global or enterprise-wide launch of the CX program across all customer-facing departments and channels.

Go-Live Launch Date

Enter date...

Deployment Channels

- ☐ Email Automation
- ☐ Mobile App Push Notifications
- ☐ In-App Messaging
- ☐ Social Media Announcements
- ☐ Direct Mail/Physical Collateral

Deployment Scale

- ☐ Regional Pilot
- ☐ National Rollout
- ☐ Global Enterprise Launch

Deployment Communication Lead

Write something...

Final Deployment Communication Assets

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Contingency Plan Summary

Write something...

Project Sponsor Approval

Monitoring, Measurement & Optimization

Establishing real-time dashboards, conducting periodic audits, and implementing a continuous improvement loop based on feedback data.

Last Audit Date

Enter date...

Current NPS Score

Enter a number...

Monitored KPI Metrics

- ☐ Net Promoter Score (NPS)
- ☐ Customer Satisfaction Score (CSAT)
- ☐ Customer Effort Score (CES)
- ☐ Churn Rate
- ☐ First Response Time (FRT)

Optimization Recommendations

Write something...

Monthly Performance Report

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Quality Assurance Lead Approval

Post-Launch Review & ROI Analysis

Assessing the project's impact on customer retention and lifetime value (LTV) against the initial 2026 strategic benchmarks.

Review Completion Date

Enter date...

Post-Launch NPS Score Improvement (%)

Enter a number...

Identified ROI Drivers

Write something...

Summary of Lessons Learned and Future Recommendations

Write something...

Key Success Metrics Achieved

- ☐ Increased Customer Retention
- ☐ Reduced Churn Rate
- ☐ Improved CSAT/NPS Scores
- ☐ Decreased Support Ticket Volume
- ☐ Higher Customer Lifetime Value (LTV)

Final ROI Performance Report

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Project Sponsor Approval

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✔ Finish

🔧 Generate Sample Report