

USE THIS CHECKLIST TO ASSESS WHETHER YOUR DECEMBER CX IS SETTING UP JANUARY SUCCESS — OR QUIETLY UNDERMINING IT.

### FIRST 30 DAYS

- ☐ Onboarding steps are clear and documented
- ☐ A quick win is delivered in week one
- ☐ Proactive check-ins are scheduled

### LOYALTY & ENGAGEMENT

- ☐ Repeat behaviour is rewarded quickly
- ☐ Loyal customers are recognised
- ☐ Buyers are invited into longer-term programmes

### JANUARY READINESS

- ☐ January messaging planned in December
- ☐ Customers invited into what's next
- ☐ Clear reason given to return in January

### POST-SALE PRESENCE

- ☐ Customers receive a genuine thank-you
- ☐ Helpful content is shared after purchase
- ☐ No long periods of silence

### CX SYSTEMS

- ☐ December friction points are documented
- ☐ Support response times improved, not slowed
- ☐ Humans step in when urgency is high

### SCORE YOURSELF

- 13–15: JANUARY-READY CX
- 9–12: MOMENTUM POSSIBLE, LEAKS EXIST
- <9: JANUARY CHURN ALREADY BAKED IN

LOW SCORE = REACTIVE Q1.

HIGH SCORE = CONTROLLED GROWTH.