YOURCXC

DIGITISE OR DIE.
THE CX TRANSFORMATION TOOLKIT.

DIGITAL TRANSFORMATION ISN'T OPTIONAL. IT'S SURVIVAL.

WHAT'S INSIDE THE TOOLKIT?

CX Digital Transformation Strategy Planner	Define your digital CX vision, goals, and key initiatives.
Digital Customer Journey Map Template	Map and optimise customer interactions across digital channels.
Digital Channel Audit Checklist	Evaluate the effectiveness of your website, social media, email, and mobile touch-points.
CX Technology Stack Planning Guide	Identify and prioritise tools for automation, personalisation, and analytics.
Customer Feedback Digitisation Checklist	Learn how to collect, analyse, and act on feedback from digital channels.
Digital Customer Data Privacy Checklist	Ensure compliance with GDPR, CCPA, and other data protection standards.

WHO IS THIS FOR?

- Business owners and founders looking to digitize customer interactions
- Marketing and CX leaders seeking to enhance digital engagement
- CX consultants and coaches guiding clients through digital transformation
- SaaS, e-commerce, and service businesses adapting to online customer needs

WHAT YOU'LL BE ABLE TO DO

- Map your full digital customer journey
- Identify and fix digital friction points
- Create a clear digital CX strategy with measurable goals
- Automate key interactions without losing personalization
- Collect and analyze digital feedback for continuous improvement

CX DIGITAL TRANSFORMATION STRATEGY PLANNER

1. CX VISION FOR DIGITAL CHANNELS

What does a seamless digital experience look like for your customers?

Example: Fast, personalised, and consistent across all devices and channels.

2. KEY DIGITAL CX GOALS

List your primary CX goals for digital transformation.

Example: Increase CSAT by 15%, achieve 90% email response rate within 1 hour, double digital channel engagement.

3. CUSTOMER SEGMENTS (DIGITAL)

Who are your primary digital customers?

Example: Mobile-first users, social shoppers, loyalty members, first-time buyers.

4. CORE DIGITAL CHANNELS

Which channels will be part of your digital CX strategy?

Example: Website, Mobile App, Social Media (Facebook, Instagram), Email, Chatbots, WhatsApp, SMS.

5. KEY DIGITAL CX INITIATIVES

What major projects will you launch to enhance digital CX?

Example: Automated email journeys, chatbot support, mobile app redesign, social media personalisation.

6. SUCCESS METRICS AND KPIS

How will you measure success?

Example: NPS (Digital), CSAT (Online), Average Response Time (Chat), Conversion Rate (Web).

7. TECHNOLOGY STACK

List the tools and platforms you will use for digital CX.

Example: CRM (HubSpot), Email Automation (Mailchimp), Chat (Zendesk), Analytics (Google Analytics, Hotjar).

8. DATA PRIVACY & COMPLIANCE

How will you ensure customer data is secure and compliant?

Example: Encrypted data storage, regular security audits, clear privacy policy.

9. TEAM ROLES & RESPONSIBILITIES

Who will manage and execute digital CX initiatives?

Example: Marketing (Social Media, Email), Customer Support (Chat, WhatsApp), Product (Website, App).

10. LAUNCH TIMELINE & MILESTONES

What are the key dates for launching and reviewing digital CX initiatives?

Example: Phase 1 – Website Redesign (Q1), Phase 2 – Chatbot Launch (Q2), Phase 3 – Mobile App Update (Q3).

11. REVIEW & IMPROVEMENT

How often will you review your digital CX performance?

Example: Monthly digital CX report, quarterly strategy review meeting.

DIGITAL CUSTOMER JOURNEY MAP TEMPLATE

STAGE	DIGITAL CHANNEL	CUSTOMER GOAL	TOUCH-POINT	FRICTION POINT
AWARENESS				
CONSIDERATION				
PURCHASE				
ONBOARDING				
RETENTION				

DIGITAL CHANNEL AUDIT CHECKLIST

1. WEBSITE (DESKTOP & MOBILE)

- [ ] Pages load quickly (under 3 seconds)
- [ ] Navigation is clear and intuitive
- [ ] Mobile responsiveness is excellent
- [ ] Key CTAs are visible and actionable
- [ ] Forms are simple and user-friendly
- [ ] Error pages (404, 500) are branded and helpful
- [ ] Privacy policy and data protection notice are visible
- [ ] Accessibility standards (WCAG) are met

2. MOBILE APP (IF APPLICABLE)

- [ ] App loads quickly and runs smoothly
- [ ] Sign-in process is simple and secure
- [ ] Push notifications are relevant and non-intrusive
- [ ] User profile is easy to access and edit
- [ ] In-app support (FAQ, chat) is available
- [ ] App updates are regularly maintained
- [ ] User reviews are monitored and responded to

3. SOCIAL MEDIA CHANNELS

- [ ] Branding is consistent (profile image, bio, handles)
- [ ] Posts are regular and aligned with brand voice
- [ ] Comments/messages monitored & responded to
- [ ] Negative comments are addressed professionally
- [ ] Stories, Reels, and Live features used for engagement
- [ ] Analytics are tracked (reach, engagement, CTR)

4. EMAIL MARKETING

- [ ] Subject lines are clear and engaging
- [ ] Email design is mobile-friendly
- [ ] Personalisation (First name, Recommendations) is used
- [ ] Clear CTAs with actionable links
- [ ] Unsubscribe option is visible and functional
- [ ] Automated sequences are reviewed regularly
- [ ] A/B testing is conducted for subject lines and content

5. LIVE CHAT & CHATBOTS

- [ ] Chat is accessible on key pages (Home, Support, Pricing)
- [ ] Response times are fast (under 1 minute for live)
- [ ] Chatbot responses are accurate and helpful
- [ ] Easy option to switch to a human agent
- [ ] Conversation history is saved for customer context
- [ ] Feedback is collected post-chat

6. WHATSAPP & SMS

- [ ] Messaging is clear, friendly, and brand-aligned
- [ ] Customers can opt-in/out easily
- [ ] Automated replies are accurate (if used)
- [ ] Support staff respond quickly
- [ ] Links in messages work correctly
- [ ] Messages comply with data protection laws (GDPR, CCPA)

7. CUSTOMER PORTAL (IF APPLICABLE)

- [ ] Login process is simple and secure
- [ ] User dashboard is clear and useful
- [ ] Account settings are easy to update
- [ ] Relevant resources (FAQs, guides) are accessible
- [ ] Support is available directly from the portal
- [ ] User data is protected and encrypted

8. ANALYTICS & TRACKING

- [ ] Website and app analytics are active
- [ ] Conversion tracking is set up for key actions
- [ ] Social media analytics are monitored
- [ ] Email open and click-through rates are tracked
- [ ] Feedback sentiment analysis is reviewed
- [ ] Data is compliant with privacy regulations

CX TECHNOLOGY STACK PLANNING GUIDE

1. CUSTOMER DATA MANAGEMENT

- ☐ Customer Data Platform (CDP) – Centralise customer data from all channels.
- ☐ Customer Relationship Management (CRM) – Manage customer interactions & history.
- Examples: HubSpot, Salesforce, Zoho CRM, Microsoft Dynamics.

2. CUSTOMER COMMUNICATION CHANNELS

- ☐ Email Marketing – Automate and personalise email journeys.
- ☐ SMS & WhatsApp – Real-time messaging for support or promotions.
- ☐ Social Media Management – Schedule, monitor, and respond to social interactions.
- Examples: Mailchimp, Twilio, Hootsuite, Buffer, Sprout Social.

3. CUSTOMER SUPPORT & SERVICE TOOLS

- ☐ Helpdesk & Ticketing – Manage customer support queries and resolutions.
- ☐ Live Chat & Chatbots – Provide instant support with automation.
- ☐ Knowledge Base – Offer self-service resources for customers.
- Examples: Zendesk, Intercom, Freshdesk, Drift.

4. AUTOMATION & WORKFLOW MANAGEMENT

- ☐ Workflow Automation – Trigger actions based on customer behaviour.
- ☐ Chatbot Automation – Answer FAQs or guide users automatically.
- ☐ Triggered Messaging – Send personalised messages at key moments.
- Examples: HubSpot Workflows, Zapier, ActiveCampaign, ManyChat.

5. ANALYTICS & REPORTING

- ☐ Web Analytics – Track user behaviour on your website or app.
- ☐ Feedback Analysis – Monitor CSAT, NPS, and sentiment trends.
- ☐ Dashboard Reporting – Visualise key CX metrics for your team.
- Examples: Google Analytics, Hotjar, Power BI, Tableau.

6. PERSONALIZATION & SEGMENTATION

- ☐ Customer Segmentation – Group customers by behaviour, value, or needs.
- ☐ Dynamic Content – Display personalised offers or messages.
- ☐ Product Recommendations – Suggest products based on customer behaviour.
- Examples: Segment, Optimisely, Dynamic Yield, HubSpot Smart Content.

7. DATA PRIVACY & SECURITY

- ☐ Data Encryption – Secure customer data at rest and in transit.
- ☐ Access Control – Restrict data access to authorised staff.
- ☐ Compliance Tools – Automate GDPR, CCPA, and other privacy compliance.
- Examples: OneTrust, TrustArc, Google Workspace Security.

8. FEEDBACK COLLECTION & MANAGEMENT

- ☐ Survey Tools – Capture feedback via CSAT, NPS, CES.
- ☐ Social Listening – Monitor brand mentions on social platforms.
- ☐ Sentiment Analysis – Automatically gauge customer emotion.
- Examples: Typeform, Survicate, HubSpot Feedback, Medallia.

9. INTEGRATION & API MANAGEMENT

- ☐ API Management – Connect CX tools to other systems.
- ☐ Data Sync – Ensure consistent data across tools (CDP, CRM, Analytics).
- ☐ Workflow Automation – Trigger actions between apps automatically.
- Examples: Zapier, Make (Integromat), MuleSoft, Workato.

CUSTOMER FEEDBACK DIGITISATION CHECKLIST

1. SETTING UP FEEDBACK CHANNELS

- [ ] Email Surveys –
  Automated post-purchase or post-support surveys
- [ ] Website Feedback –
  Pop-up CSAT, NPS, or feedback forms
- [ ] Mobile App Feedback –
  In-app surveys and rating prompts
- [ ] Social Media Listening –
  Monitor comments, reviews, and direct messages
- [ ] Live Chat & Messaging –
  Capture feedback after chat interactions
- [ ] Online Reviews –
  Monitor Google Reviews, Trustpilot, Yelp

2. DESIGNING EFFECTIVE DIGITAL FEEDBACK FORMS

- [ ] Keep surveys short (3–5 questions)
- [ ] Use a mix of question types (CSAT, NPS, open text)
- [ ] Include a question for open feedback ('Tell us more...')
- [ ] Use branching logic for personalized questions
- [ ] Make feedback forms mobile-friendly

3. AUTOMATING FEEDBACK COLLECTION

- [ ] Set up automated survey triggers
  (post-purchase, post-support)
- [ ] Use email automation for follow-up surveys
  (30, 60, 90 days)
- [ ] Connect feedback forms to CRM
  (HubSpot, Salesforce)
- [ ] Use chatbot triggers to request feedback after interactions
- [ ] Send feedback requests for app reviews
  (Apple Store, Google Play)

4. CENTRALISING FEEDBACK DATA

- [ ] Store feedback in a centralised dashboard
  (HubSpot, Notion, Airtable)
- [ ] Tag feedback by type
  (positive, negative, product, support)
- [ ] Use sentiment analysis for open text responses
- [ ] Automatically categorise feedback by channel (
  Email, App, Web)

5. ANALYZING FEEDBACK FOR INSIGHTS

- [ ] I
  dentify top feedback themes
  (Quality, Speed, Support)
- [ ] Monitor CSAT, NPS, and CES scores
- [ ] Use sentiment analysis for open text comments
- [ ] Track trends in feedback volume and sentiment

6. RESPONDING & CLOSING THE LOOP

- [ ] Acknowledge customer feedback promptly
  (automated email or message)
- [ ] Assign feedback to relevant teams for action
  (support, product)
- [ ] Communicate changes made based on feedback
  ('You said, we did')
- [ ] Monitor follow-up satisfaction
  (Did the fix work?)

7. DATA PRIVACY & COMPLIANCE

- [ ] Obtain customer consent for feedback collection
  (GDPR, CCPA)
- [ ] Secure data storage with encryption and access control
- [ ] Set data retention policies
  (delete after a set period)
- [ ] Include a privacy policy link in feedback forms
- [ ] Regularly review compliance practices
  (annual review)

8. CONTINUOUS IMPROVEMENT

- [ ] Schedule regular feedback review meetings
  (monthly, quarterly)
- [ ] Update feedback questions based on changing customer needs
- [ ] Optimise feedback channels for better response rates
- [ ] Share feedback insights with all relevant teams
  (CX, Marketing, Product)

DIGITAL CUSTOMER DATA PRIVACY CHECKLIST

1. DATA COLLECTION & CONSENT

- [ ] Obtain explicit customer consent before collecting data (opt-in).
- [ ] Display a clear and visible link to your privacy policy on all forms.

2. DATA STORAGE & SECURITY

- [ ] Use SSL/TLS encryption for data transmission (web forms, apps).
- [ ] Securely store customer data with access control and encryption.

3. DATA ACCESS & PERMISSIONS

- [ ] Restrict access to customer data to authorised staff only (role-based).
- [ ] Regularly review user permissions and revoke access for inactive accounts.

4. DATA USAGE & PROCESSING

- [ ] Use data only for the purposes specified in your privacy policy.
- [ ] Anonymise or pseudonyms data where possible for extra security.

5. CUSTOMER RIGHTS MANAGEMENT

- [ ] Allow customers to access, update, or delete their data on request.
- [ ] Respond to customer data requests within legal timeframes (e.g., 30 days).

6. DATA RETENTION & DISPOSAL

- [ ] Set clear data retention periods and enforce automatic deletion.
- [ ] Securely delete customer data when it is no longer needed.

7. PRIVACY POLICY & TRANSPARENCY

- [ ] Maintain an up-to-date privacy policy, easily accessible on your website.
- [ ] Notify customers of any significant changes to your privacy policy.

8. DATA BREACH MANAGEMENT

- [ ] Have a documented data breach response plan (who, what, when).
- [ ] Notify affected customers and authorities within the required timeframe.

9. COMPLIANCE MONITORING & REVIEW

- [ ] Regularly review data protection compliance (GDPR, CCPA).
- [ ] Conduct annual data privacy audits and keep records of data activities.

YOURCXC

**FIX THE EXPERIENCE.
GROW THE REVENUE.**

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