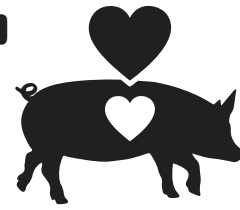


Your 30/60/90-Day Customer Experience Roadmap

Building a business that people love isn't about one grand gesture; it's about the small, consistent steps you take every single day. It's a journey of a thousand moments, each one an opportunity to show your customers you care. This checklist is your first map on that journey. It turns big ideas into small, actionable steps, helping you build momentum and create real change. Are you ready to begin?



**WHAT'S YOUR
BACON?**
MASTER HAPPINESS

Days 0–30: Foundation & Quick Wins

This first month is all about building your foundation. It's about listening, learning, and securing those crucial early victories that prove this work matters.

[B] Baseline & Benchmark

- Assemble your core team and physically map the current customer journey together. (Owner: CX Lead)
- Interview 3-5 customers to hear about their experiences in their own words. (Owner: Marketing)
- Identify your top three "moments of truth" where the experience often breaks down. (Owner: CX Lead)
- Define your North Star Metric and two leading indicators to track progress. (Owner: Leadership)

[A] Automate with Empathy

- Pinpoint one repetitive task that you can automate to free up your team. (Owner: Support Manager)

[C] Close the Loop

- Launch a dedicated internal channel for sharing all customer feedback and wins. (Owner: CX Lead)

[N] Nurture Loyalty

- Identify your top 10 most loyal customers from the past quarter. (Owner: Sales/RevOps)

Days 31–60: Build & Connect

Now that you have your baseline, it's time to connect the dots. This phase focuses on bridging gaps between teams and channels, creating a more seamless and human experience.

[A] Automate with Empathy

- Deploy your first empathetic automation with an easy "escape hatch" to a person. (Owner: Support Manager)
- Draft and design a personalized welcome email sequence for all new customers. (Owner: Marketing)

[C] Close the Loop

- Train at least one department on the new cross-functional feedback review process. (Owner: CX Lead)
- Implement a simple process for support to flag issues directly to product/dev teams. (Owner: Product Manager)

[O] Orchestrate Omnichannel

- Audit your welcome experience across three channels to ensure message and tone consistency. (Owner: Marketing)

[N] Nurture Loyalty

- Execute one "surprise and delight" initiative for your most loyal customers. (Owner: CX Lead)

Days 61–90: Optimize & Scale

With momentum on your side, this final phase is about refining your efforts and scaling what works. This is where your small wins compound into significant, sustainable growth.

[B] Baseline & Benchmark

- Review your CX metrics from the first 60 days and share key insights. (Owner: CX Lead)

[A] Automate with Empathy

- Identify a second process to automate based on your team's direct feedback. (Owner: Support Manager)

[C] Close the Loop

- Present a key customer finding at a company-wide or leadership meeting. (Owner: Leadership)

[O] Orchestrate Omnichannel

- Map and improve one complete cross-channel journey, like cart abandonment or re-engagement. (Owner: RevOps)
- Begin planning how customer data can be shared across platforms for a smoother journey. (Owner: Tech Lead)

[N] Nurture Loyalty

- Create a simple, repeatable process for requesting testimonials from your happy customers. (Owner: Marketing)

Weekly Cadence

Consistency is the engine of progress. Use these two simple meetings to keep the momentum going.

- Daily CX Stand-Up (15 mins)
- What customer feedback did we receive yesterday?
- Are there any blockers to our CX goals?
- Shout-out one team member for a great customer moment.
- Friday CX Review (30 mins)
- Review progress against this week's checklist items.
- Celebrate wins and discuss challenges.
- Set priorities for the upcoming week.
