

CX Action Checklist

Follow these 5 steps to move from insights to real customer impact.

1. Involve the Right People

- ☐ Book a 3-hour slot with 2-3 customer-facing employees + 1 decision-maker
- ☐ Clarify the goal of the session in advance: “*From insights → actions*”

2. Run a CX Action Workshop

- ☐ Kick off with purpose: why these insights matter
- ☐ Share hypotheses clearly with all participants
- ☐ Prioritize and assign owners for the top 2-3 actions
- ☐ Document next steps live in a simple action plan

3. Frame Hypotheses

- ☐ Write down 2-3 “we believe...” statements based on your CX workshop ideas and insights
- ☐ Check they are testable (can be tried within weeks, not months)

4. Select Interventions

- ☐ List possible actions for each hypothesis
- ☐ Decide on max 2-3 initiatives to test now
- ☐ Write success criteria: “*We’ll know this worked if...*”
- ☐ Set an evaluation date to decide: iterate/scale/stop

5. Keep Momentum Alive

- ☐ Communicate progress or an early win within 30 days (keeps trust alive)
- ☐ Share updates visibly (team meetings, intranet, dashboards)
- ☐ Evaluate actions on the agreed date and adjust as needed (scale only what works)

Pro Tip: Pin this checklist where the team sees it. Cross off items as you go. The visible progress boosts both energy and credibility.