

Checklist for Starting Digital Customer Service

- ✓ Set clear goals for each digital channel
- ✓ Look into customer preferences for talking online
- ✓ Pick the right contact center solutions and digital tools
- ✓ Create or update your knowledge base with full articles
- ✓ Design an easy-to-use self-service portal
- ✓ Add live chat to your website
- ✓ Set up key messaging apps
- ✓ Make a plan for social media
- ✓ Train human agents on new systems and agent-assist tools
- ✓ Plan how AI agents will talk
- ✓ Make sure all channels work smoothly together
- ✓ Use workflow automations
- ✓ Set up rules for customer data safety
- ✓ Create dashboards to track metrics
- ✓ Test and get feedback before going live