

# CX & Process Audit Checklist

A practical checklist for diagnosing customer journeys, contact center operations, service quality, process friction and operating KPI visibility.

## How to use this executive resource

Use this document as a working aid in a leadership, diagnostic, roadmap or advisory discussion. Capture current-state observations, gaps, decisions, owners and immediate next steps before initiating a larger implementation or transformation program.

## Core sections

- Journey and touchpoint mapping
- Contact center and service workflow review
- Process bottlenecks and quality issues
- Voice of customer and employee signals
- Improvement roadmap and KPI dashboard

Area	Current evidence	Gap / risk	Owner	Next step

## Recommended 30-60-90 day conversation

**First 30 days:** Clarify the business problem, current-state baseline, owners, available data and immediate quick wins.

**Next 60 days:** Run the focused diagnostic or workshop, define target-state operating model, prioritise initiatives and create governance cadence.

**Next 90 days:** Launch controlled pilots or execution waves, track adoption, review benefits and refine the roadmap.

## Scope note

This resource is intended for business-readiness and planning conversations. Legal, tax, regulatory, valuation, investment, data-protection and sector-specific compliance advice should be obtained from appropriately qualified professionals where applicable.