

# Omnichannel CX readiness checklist

## Strategy

- End-to-end holiday journey mapped out across site, app, marketplaces, and stores.
- Key paths (discovery, research, purchase, pickup, return) are documented for both online-first and store-first shoppers.
- AI-driven discovery (search, assistants, recommendations) is included in your journey maps.
- Holiday campaigns, offers, and messaging are aligned across every channel.
- Brand voice, visuals, and core promises stay consistent wherever customers interact with you.

## Operations

- Online and in-store inventory sync in near real time for core holiday products.
- You can see stock levels by channel and location from a single view.
- Buy online, pick up in-store (BOPIS) and ship-from-store processes are clearly defined.
- Promised pickup windows and delivery timelines are realistic and tested.
- Returns and exchanges work across channels (online purchases accepted in-store, and vice versa).
- Staff know how to look up orders, availability, and alternatives for any channel.

## Experience

- Customer profiles and preferences inform messaging across email, SMS, app, and ads.
- Offers and rewards feel consistent, whether customers shop online, in your app, or in-store.
- Recommended products reflect current inventory and holiday priorities.
- Loyalty identifiers (email, phone, QR, or app ID) work across channels.
- Staff can see or request the information they need to personalize help appropriately.
- Customers can start a cart in one channel and easily complete it in another, where supported.