

Black Friday Customer Service Readiness Checklist

Use this checklist before Black Friday to ensure your support team is prepared for increased ticket volume, customer inquiries, and operational challenges.

Staffing and coverage

- ☐ Have we forecasted expected support ticket volume?
 - ☐ Have peak support hours been identified?
 - ☐ Have additional shifts or backup coverage been scheduled?
 - ☐ Have staffing contingency plans been created for unexpected demand spikes?
-

Agent training

- ☐ Have agents been briefed on Black Friday promotions and discounts?
 - ☐ Have checkout and payment-related procedures been reviewed?
 - ☐ Have shipping, delivery, return, and refund policies been communicated to the team?
 - ☐ Have escalation procedures been shared with all support staff?
-

Knowledge base and self-service

- ☐ Have Black Friday FAQs been updated?
- ☐ Have knowledge base articles been reviewed for accuracy?
- ☐ Is shipping and delivery information up to date?
- ☐ Are return and refund policies easy for customers to find?
- ☐ Have all help center links and resources been tested?

Response templates

- ☐ Have templates been created for delivery-related inquiries?
 - ☐ Have templates been prepared for discount and promotion questions?
 - ☐ Have return and refund response templates been updated?
 - ☐ Have order status and stock availability templates been reviewed?
-

Ticket routing and prioritization

- ☐ Have priority rules been defined for checkout and payment issues?
 - ☐ Are urgent customer-impacting tickets routed appropriately?
 - ☐ Have service-level expectations been established for high-priority requests?
 - ☐ Are routing workflows tested and functioning correctly?
-

Escalation readiness

- ☐ Have owners been assigned for critical operational issues?
 - ☐ Are escalation paths documented and accessible?
 - ☐ Have contacts for ecommerce, payment, and logistics teams been identified?
 - ☐ Is management coverage available during peak periods?
-

Channel readiness

- ☐ Is support coverage available across email, chat, and social media channels?
- ☐ Have customer communication channels been tested?
- ☐ Are response expectations consistent across channels?
- ☐ Can agents access customer context across all touchpoints?

Automation and workflows

- ☐ Have ticket routing automations been tested?
 - ☐ Have customer notification workflows been validated?
 - ☐ Have chatbot responses been reviewed and updated?
 - ☐ Have repetitive manual tasks been automated where possible?
-

Monitoring and reporting

- ☐ Are dashboards configured for ticket volume and queue monitoring?
 - ☐ Are response-time and resolution-time metrics being tracked?
 - ☐ Have escalation alerts been configured?
 - ☐ Have monitoring responsibilities been assigned?
-

Post-Black Friday support

- ☐ Have return and refund workflows been reviewed?
- ☐ Have plans been created for handling delivery-delay inquiries?
- ☐ Have exchange and replacement processes been documented?
- ☐ Is adequate staffing available for post-sale support volume?

Final approval check

Before Black Friday launches, confirm:

- ☐ Staffing coverage is approved.
 - ☐ Agents have completed training.
 - ☐ FAQs and knowledge base content are updated.
 - ☐ Response templates are available.
 - ☐ Routing and escalation processes are documented.
 - ☐ Automations and workflows have been tested.
 - ☐ Monitoring dashboards are configured.
 - ☐ Post-sale support processes are ready.
-

Decision

- ☐ Ready for Black Friday
- ☐ Requires additional preparation before launch
- ☐ High-risk areas identified and assigned for follow-up