



Support Channel Launch Checklist

Everything to confirm before turning on a new support channel — live chat, WhatsApp, or a new voice line — for the first time

Why a Checklist

Launching a new support channel usually goes wrong in one of two ways: it's turned on before agents are actually trained on its specific etiquette, or it's turned on before volume routing and reporting are wired up, so the first two weeks of data are unusable. This checklist covers both failure modes.

4 Weeks Before Launch

- ☐ Confirm expected volume estimate and staffing plan for the new channel
- ☐ Identify channel-specific tone/etiquette differences from existing channels (e.g., chat brevity vs. email formality)
- ☐ Draft channel-specific macros and canned responses for top 10 anticipated ticket types
- ☐ Confirm integration path into existing CRM/helpdesk for unified reporting

2 Weeks Before Launch

- ☐ Complete agent training on channel-specific tooling and etiquette
- ☐ Run a closed pilot with internal test tickets to confirm routing works end-to-end
- ☐ Confirm escalation path for the new channel matches existing escalation matrix
- ☐ Set up channel-specific reporting fields (response time, resolution time, CSAT) before go-live, not after

Launch Week

- ☐ Soft-launch to a limited audience or announce with modest visibility before full promotion
- ☐ Daily check-ins on volume, response time, and any routing issues for the first 5 business days



- ☐ Collect agent feedback on channel-specific friction points daily during week one

Soft-launch first. A quiet rollout to a limited audience surfaces routing and tooling issues before they're visible to your full customer base.

Weeks 2-4 Post-Launch

- ☐ Review week-one data against volume estimate; adjust staffing if actuals differ significantly
 - ☐ Update macros/canned responses based on real ticket patterns observed
 - ☐ Formal 30-day review comparing channel performance against original goals
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© Infusion BI. This checklist reflects our standard channel-launch methodology; specific timelines may be adjusted based on channel complexity and volume.