

X Customer Service Checklist



Figure 1: Inspire To Thrive

X Customer Service Action Plan Checklist

For Small Businesses & Solopreneurs

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Use this checklist to implement effective customer service on X (formerly Twitter). Check off items as you go!

Quick Setup (Week 1)

- ☐ Update your X profile bio with support hours, time zone, and DM instructions
- ☐ Enable DMs from anyone (Settings > Privacy and safety > Direct Messages)
- ☐ Create a welcome DM message setting expectations
- ☐ Pin a support policy post with hours and guidelines

Monitoring & Notifications

- ☐ Turn on mobile/email notifications for mentions and replies
- ☐ Set up saved searches or columns for your brand name, variations, products, and keywords
- ☐ Test a monitoring tool (e.g., Brand24 or X Advanced Search) for indirect mentions

Response Templates

- ☐ Create 3–5 saved replies: Acknowledgment, DM request, Delay update, Resolution confirmation, Escalation
- ☐ Review templates for empathetic, on-brand language

Workflow & Tracking

- ☐ Build or set up a simple spreadsheet for case tracking (metrics + outcomes)
- ☐ Define escalation rules for sensitive/complex issues
- ☐ Test the full workflow: Monitor → Public reply → DM → Resolve → Close loop

Ongoing Maintenance

- ☐ Review response times and metrics weekly

- ☐ Update saved replies and policy as needed
- ☐ Analyze recurring issues monthly and feed into product/content improvements
- ☐ Revisit this checklist every 30 days

Pro Tip: Start small—focus on business hours first. Consistency beats perfection!

Download or print this checklist and keep it handy. Questions? Visit inspiretothrive.com for more small business tips.

Inspire To Thrive / Lisa Sicard

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