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CX Insight

AN EXECS IN THE KNOW PUBLICATION



Less Artificial, More Human

Are we ready for the next revolution in technology?

**JOIN THE
NEW ERA OF
INNOVATION:
OVERCOMING
OBSTACLES TO
AI ADOPTION**

**OUTSOURCING TO AFRICA:
TOP COUNTRIES FOR BPO**

**BRAND SPOTLIGHT:
WOOM BIKES**

**THE EX FACTOR: IDENTIFYING
& TRANSFORMING
EMPLOYEE JOURNEYS**



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Welcome to the July 2023 edition of *CX Insight* magazine, an Execs In The Know publication.

AI is powering the future of customer experience.

In this issue, we'll explore the exciting future that lies ahead in the ever-evolving landscape of customer experience (CX). As leaders in this industry, it is our responsibility to anticipate and adapt to the changes that shape the way we engage with customers, ensuring exceptional experiences in the digital age.

Follow along as we dive into the new era of CX, where the convergence of Artificial Intelligence (AI) and Large Language Models (LLM) promise groundbreaking possibilities. Discover how the fusion of technology and human touch empowers us to deliver hyper-personalized experiences to forge meaningful connections.

While technology is a crucial component, we also recognize the vital role employee experience plays in shaping the customer journey, and the importance of fostering a culture that empowers and engages. Additionally, we turn our attention to examining customers' increasing demand for environmentally conscious practices from brands as we explore reimagining sustainability for CX.

We are also thrilled to present an exclusive KIA Online Community Member Spotlight with Delta Faucet Company and a Brand Spotlight with woom Bikes that showcases why the brand has been recognized as one of the fastest-growing companies in America.

Together, we can navigate the evolving landscape, harness the power of technology, foster exceptional employee experiences, promote sustainability, and create meaningful connections with our customers.

As always, we hope that something in this issue enlightens your perspective and provides the spark for new ideas and innovation. ✨

Have a story idea? Submit it to info@execsintheknow.com.

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Join the New Era of Innovation: Overcoming Obstacles to AI Adoption

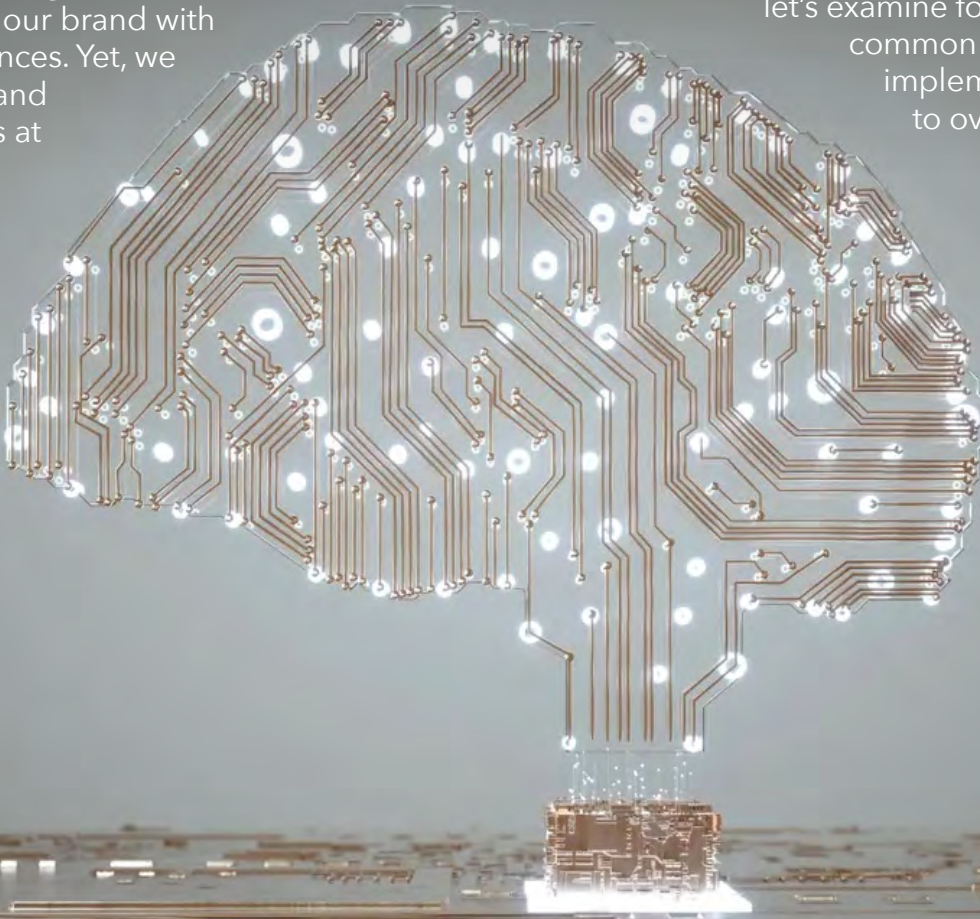
by Execs In The Know

Let's examine five of the most common obstacles to AI adoption and the ways to overcome them.

The artificial intelligence (AI) movement is upon us, and with recent advancements, it's the perfect time for customer experience (CX) leaders to reexamine their existing use of AI, explore what is now possible, or reconsider it as a viable solution. But wait – where do we begin? We've all heard horror stories about AI implementations gone wrong, and the last thing we want is to compromise our brand with poor experiences. Yet, we need a plan and have answers at

the ready when the C-suite asks how we are planning to use ChatGPT and Generative AI and how soon can we launch it.

If you believe the best offense is a good defense, this article is for you. Understanding some of the key risks and ways to mitigate them is a critical part of being successful in the AI revolution. To get you on the best path, let's examine four of the most common obstacles to AI implementation and ways to overcome them.



Obstacle 1: Trust and Acceptance

Regarding implementations, two negative storylines appear in the headlines regularly: AI has gone awry and AI is replacing humans. This prevalence and exposure stoke fear among two important stakeholder groups: your employees and your customers. And, while that's understandable, these trepidations can be addressed and overcome.

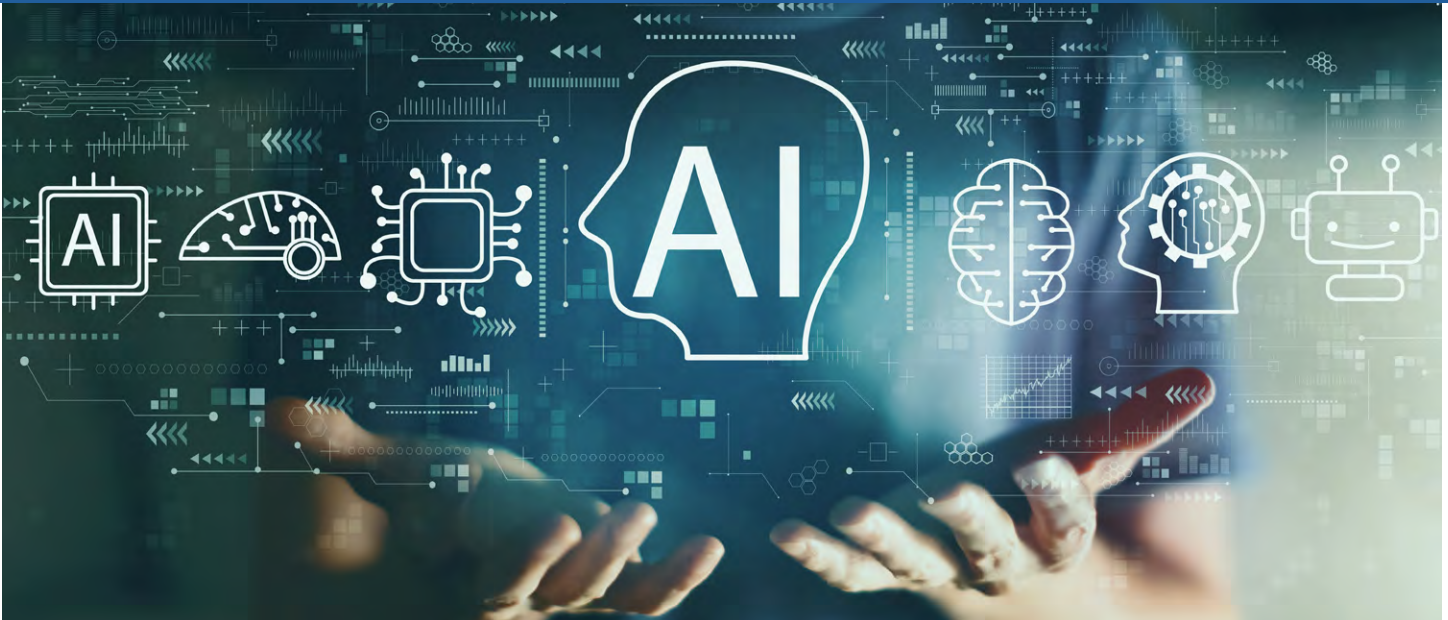
From the employee perspective, fear of job loss or displacement is a primary concern. Employees may perceive that the advances in and expansion of AI will render their skills (and therefore their jobs) obsolete. In fact, recent research reveals that "more than two-thirds of employees (68%) believe that some jobs are at risk because of AI and 23% believe their jobs are at risk."¹ They also may have a fear of the unknown, leading to worry about changes to their roles, expectations, and performance measurements. Further, employees may lack trust in AI, viewing it as error-prone, incapable of resolving complex issues, and biased in its responses.

Trust can also be an issue for customers, who may want to interact with humans to ensure their needs are understood and addressed while

their data and privacy are protected. In addition to the many customers that value the personal touch of a human-to-human interaction for some issues, customers also may be concerned about the security of their personal information when dealing with AI systems. Many worry that this technology may misuse or mishandle their data, exposing them to identity theft or data breaches.

To overcome this obstacle, organizations might double down on ways to foster trust and create buy-in with these important stakeholder groups. First and foremost, companies can build an isolated environment for AI test-and-learn activities, creating ways for employees and customers to be part of this experimentation.² These tests should be conducted in a manner that minimizes the influence of bias or prejudice, such as using the scientific method, which provides an objective, standardized approach and improves results.

Secondly, organizations can gather and listen to the voice of the employee and customers throughout the development life cycle, including the planning, design, testing, implementation, and maintenance phases. Including these groups just before and after implementation is not enough.



Conducting focus groups to gather perceptions, crowdsourcing to generate ideas, and upvoting to prioritize focus areas are meaningful and effective ways to include stakeholders at all phases of the project. An effective way to engage employees and customers is to have them experience AI-powered interactions; these efforts will increase transparency and give them something specific and tangible to respond to. This context and experience are critical. In addition, this technique will help bring them along throughout the journey.

Another important tactic is to keep them informed and updated on progress, success, failures, and next actions. Look for ways to increase awareness of this important work across the employee and customer populations. One valuable way to do this is to create a dedicated campaign with communication channels that are always up to date on what's been done, how it went, and what's next.

These steps will help organizations create an inclusive process that builds trust and acceptance of AI technology and its applications to improve interactions, experiences, and outcomes. Creating a collaborative and transparent environment where humans and technology work together to achieve mutual success is imperative in the AI revolution.

Obstacle 2: The Balance of Human vs. Digital

The second challenge that organizations face when joining the AI revolution is the balance between human interactions and digital experiences. Striking the right balance is tough. Overreliance on AI can deliver impersonal interactions, while a limited amount of automation may sub-optimize the scale and cost-effectiveness, hindering the achievement of business goals. CX leaders can consider a variety of ways to strike this important human vs. digital balance.

A good starting point is for organizations to create a contact matrix to reveal where opportunity exists. By examining and categorizing top contact types, CX teams can identify the interactions that stay with humans and those that AI can best handle. For instance, interactions that are emotionally charged and require empathy and judgment should remain with humans for resolution. The same is true for complicated interactions that need a human to connect the dots to resolve the issue, as well as contact types that typically require multiple touches to complete. Conversely, contacts that are simple, routine, and/or mundane generally are ideal for AI to handle end-to-end.³

Another tactic to help achieve balance is to define the hand-off points and create smooth transitions



between AI and human agents. Implementing intelligent routing systems that escalate customer interactions from AI to humans when the complexity exceeds the AI's capabilities or when a customer requests human assistance is critical to delivering positive experiences and achieving business objectives.

Finally, over-indexing the use of AI to support agents is a tried-and-true approach. Empowering human agents with AI-driven tools to enhance their productivity and decision-making while creating consistency from interaction to interaction is a great way to balance the use of human and AI skills. Using AI to provide real-time suggestions, recommend solutions, and offer relevant knowledge resources enables agents to respond more effectively to customer needs. This use of technology also creates a more personalized agent experience, which comes full circle to increase trust and acceptance of AI systems and applications.

Obstacle 3: Building Your Business Case

In today's hyper-competitive business landscape, CX has emerged as a critical differentiator for organizations seeking to thrive and grow. With advancements in AI, businesses now have access to powerful tools that can revolutionize their CX strategies. However, to implement an AI CX solution successfully, it is

essential to build a compelling business case that justifies the investment and outlines the potential benefits. In this article, we will explore the key steps to building a strong business case for an AI CX solution.

- 1. Identify CX Pain Points:** The first step in building a business case is to identify your organization's existing CX pain points. Conduct thorough research, analyze customer feedback, and engage with frontline employees to understand the challenges faced during the customer journey. Common pain points may include long wait times, repetitive queries, inconsistent service quality, and a lack of personalization. Documenting these pain points helps establish the need for an AI-powered solution.
- 2. Define Objectives and Benefits:** Clearly define the objectives you aim to achieve with an AI CX solution. These may include improving customer satisfaction, reducing customer churn, increasing operational efficiency, enhancing personalization, or optimizing resource allocation. Additionally, outline the expected benefits, such as improved customer loyalty, increased revenue, cost savings, and competitive advantages. Quantify these benefits wherever possible to make the business case more persuasive.

3. Understand AI CX Solution Capabilities:

Thoroughly research AI CX solutions available in the market to understand their capabilities and how they align with your objectives. Evaluate different tools and technologies, such as natural language processing (NLP), sentiment analysis, chatbots, voice assistants, and machine-learning algorithms. Identify specific features and functionalities that address your pain points and have the potential to deliver the desired outcomes.

4. Assess Financial Impact: An important aspect of the business case is assessing the financial impact of implementing an AI CX solution. Estimate the initial investment required, including software licensing, infrastructure, and employee training costs. Balance this against the expected returns, such as increased revenue through improved customer satisfaction, reduced operational costs, and potential upselling and cross-selling opportunities. Consider the return on investment (ROI) and payback period to demonstrate the financial viability of the project.

5. Conduct a Risk Analysis: Every business case should include a risk analysis to address potential challenges and mitigate risks associated with implementing an AI CX solution. Identify potential risks, such as data privacy and security concerns, system integration complexities, resistance from employees or customers, or regulatory compliance issues. Develop a risk mitigation strategy that outlines steps to address these risks and ensure a smooth implementation and adoption process.

6. Highlight Competitive Advantages:

Demonstrate how an AI CX solution can give your organization a competitive edge in the market. Research your industry and identify key competitors who have already implemented AI in their CX strategies. Highlight their success stories and how they

have leveraged AI to improve customer satisfaction and gain a competitive advantage. Showcase how your proposed solution can help you stay ahead of the curve and meet evolving customer expectations.

7. Create an Implementation Roadmap: Develop a detailed implementation roadmap that outlines the steps required to deploy the AI CX solution. Identify the necessary resources, timelines, and key milestones. Consider factors such as data preparation, system integration, staff training, and change management. Present a well-thought-out plan that demonstrates your organization's readiness to execute the project successfully.

Building a strong business case for an AI CX solution requires a thorough understanding of the organization's pain points, objectives, and potential benefits. By demonstrating the financial impact, addressing potential risks, and highlighting the competitive advantage, you can effectively convince stakeholders of the value of implementing an AI-powered solution. With a compelling business case, your organization can embark on a transformative journey to enhance customer experience, boost operational efficiency, and drive sustainable growth in today's dynamic business environment.

Obstacle 4: Existing System Integration

Integrating multiple technology solutions can be tricky, and adding AI to an existing system is no exception.⁴ Although integration is required to ensure smooth interoperability and compatibility with legacy systems, this work can pose several challenges. Legacy systems that were not designed to work with AI, data compatibility issues, and scalability and performance limitations are among the most common integration complications. At a minimum, AI integration into an existing technology stack is a complex, time-consuming and resource-intensive effort.

To overcome integration challenges, organizations should start by assessing their existing systems against AI implementation requirements. Conducting a compatibility assessment of platforms, databases, and ticketing systems to understand the architecture, data formats, and integration capabilities is a key first step. A primary output of this work is the identification of potential gaps to be addressed.

From there, organizations can clearly define integration requirements and identify the specific functionalities and data exchange points where AI can add value. These actions lead to the development of a clear integration strategy and roadmap that outlines the steps, resources, and timing for integration. This upfront work will help prioritize integration efforts, ensure a detailed and focused approach, and help everyone on the team understand the opportunity – all contributing to the success of the integration.

A modular approach is often more manageable and successful when planning the integration. Rather than trying to overhaul an entire system, consider adopting a segmented or phased approach. A good way to achieve this is to break down the integration work into smaller, manageable components or modules.

Organizations should consider the use of application programming interfaces (APIs),

middleware, or similar protocols to facilitate communication and interoperability between the existing systems and AI.

This approach has several advantages:

- Allows for incremental implementation
- Reduces the risk of disrupting the entire customer service ecosystem
- Decreases the complexity of integration, making it more manageable
- Coordinates the interactions between different systems to ensure seamless communication

Obstacle 5: Understanding the Long-Term Support Vision

In the ever-evolving landscape of AI, understanding the long-term support vision

for AI in enhancing CX has become a pressing challenge for organizations. As AI technologies rapidly advance, so do the expectations of customers.

Teams must evaluate and educate themselves on the potential of AI, as the future of customer service hinges upon their ability to harness its power effectively. By taking the time to understand the capabilities and limitations of AI,

teams can unlock its potential and ensure that their services not only meet but exceed the ever-rising bar of customer satisfaction.



By taking the time to understand the capabilities and limitations of AI, teams can unlock its potential and ensure that their services not only meet but exceed the ever-rising bar of customer satisfaction.



Continuous Improvement: AI models, including generative AI, require ongoing updates and improvements to stay relevant and accurate. Organizations can plan for regular model updates, feature enhancements, and bug fixes by understanding the long-term support vision. This proactive approach ensures that the AI system continues to evolve and perform optimally, leading to better customer support over time.

Scalability and Efficiency: Generative AI can automate various tasks and processes, allowing organizations to handle customer inquiries and requests at scale. However, as customer demands evolve, AI systems must adapt and accommodate new requirements. By understanding the long-term support vision, organizations can design AI architectures and infrastructure that can scale seamlessly, ensuring efficient and effective customer support even as the customer base grows, or requirements change.

Ethical Considerations: Generative AI raises ethical considerations around privacy, data security, and the potential impact on society. Organizations should consider the long-term implications of AI usage to ensure ethical and responsible practices. By understanding the long-term support vision, organizations can assess and mitigate risks, develop robust data governance frameworks, and establish guidelines for AI usage that align with their customers' values and societal expectations.

The New Era of Innovation Is Here to Stay

We all know that the new era of innovation is here ... and it is here to stay! We see it daily in the news, in industry emails and publications, and in our day-to-day life and work. Even though the risks are real, when done well, the benefits of AI in CX far outweigh the challenges.

The urgency to evaluate and educate teams cannot be overstated. As the AI landscape continues to evolve at breakneck speed, organizations that fail to embrace the possibilities of AI risk falling behind their competitors. By fostering a culture of continuous learning and exploration, leaders can empower their teams to embrace AI and embrace the opportunities it presents.

Together, we can shape a future where AI-driven customer experiences are seamlessly integrated into our daily lives, delighting customers and propelling organizations to new heights of success. It's time to seize the reins of change and steer our organizations toward a future where customer expectations are met with confidence and innovation.

As always, with careful planning and attention, you can overcome these common obstacles and be successful in implementing AI. This resurgence of AI technology is transforming the way customer and employee interactions are managed. It's an opportunity multiplier to build efficiencies, be effective, and be poised to deliver exceptional CX. 

Links:

- 1 <https://www.businesswire.com/news/home/20230613882872/en/AI-Generates-Excitement-and-Fear-as-Employees-Worry-about-Job-Security>
- 2 <https://learn.g2.com/generative-ai-in-customer-service>
- 3 <https://execsintheknow.com/magazines/april-2023-issue/the-pervasiveness-of-ai-in-the-customer-service-experience/>
- 4 <https://www.mckinsey.com/capabilities/operations/our-insights/the-next-frontier-of-customer-engagement-ai-enabled-customer-service>



Outsourcing to Africa: Top Countries for BPO

Africa is leading the geographic diversification "revolution" with competitive BPO solutions.

By Nick Jiwa, Founder and President, CustomerServ

The global business process outsourcing (BPO) market is currently valued at over \$260 billion and is expected to exceed \$500 billion by 2030, according to [Grand View Research](#)¹. Mature outsourcing markets like the Philippines and India are well-established, but saturation and intense competition for labor are growing concerns.

Next-generation "hot spots" will continue to emerge as brands seek untapped markets and emerging suppliers with talented workers. Africa is leading the geographic diversification "revolution" with competitive BPO solutions.

Let's delve into the emergence of African outsourcing.

Why Is Africa Rising?

Africa has been previously overlooked for several reasons, including infrastructure, geo-political issues, and slow market development.

Over the past 10-20 years, various African countries have made great strides in tech-enabled services, including BPO. One of Africa's greatest assets is a skilled, yet underutilized, talent pool.

According to the African Development Bank:

- There are roughly 420 million youth in Africa between the ages of 15 and 35.
- Africa is the world's [youngest](#)² region, with a median age of 25.
- There is a high rate of unemployment and underemployment in many African countries.
- Over 12 million African youth enter the job market annually.
- Available workers can face prolonged unemployment and underemployment.
- Without meaningful career prospects, skills can atrophy, leading to regressive societal issues.

Perceptions of Africa vs. Reality

There has been a perception that African countries are playing catchup in tech-enabled services. Let's address perception vs. reality.

Misperceptions:

- Poor infrastructure, underdeveloped countries
- Low wages and worker exploitation
- Data security and customer experience risks
- Market immaturity in the BPO sector
- Limited knowledge of U.S. brands and a lack of cultural affinity
- Geo-political issues and corruption

Reality:

- Improving infrastructure, rivaling first-world cities leading the BPO industry
- Call centers have supported European, Australian, and African companies for 20+ years
- Progressive BPOs have transitioned to supporting U.S. clients with great effect
- Broader adoption of Africa as a "go-to" offshore market
- Highly skilled, tech-savvy, educated, and motivated workforce
- Strong English communication skills—spoken and written
- Minimal weather-related events compared to other offshore markets





Why Is Africa an Attractive Market for BPO?

Since the onset of offshoring, we have always eyed "the next best outsourcing region." For English language support, brands can continue to over-index head count in current markets or look to newer, competitive destinations.

For corporate brands seeking a burgeoning option for outsourcing, Africa offers many advantages, including:

1. **Competitive costs** – On par with other offshore markets and more competitive than most nearshore locations.
2. **English language** – The first or second language in many [African](#)³ countries.
3. **Talent pool** – An abundance of young, educated, tech-savvy, trainable workers vying for a career in BPO.
4. **Unsaturated markets** – Access to an untapped labor pool, less competition for talent, and more selective hiring.
5. **Impact sourcing** – Brands can invest in socially conscious practices, enabling job creation and career opportunities for persistently unemployed and disadvantaged individuals.

6. **STEM-focused education** – The [African Union](#)⁴ is committed to [STEM](#)⁵ – Science, Technology, Engineering, and Mathematics – education systems grooming future business leaders among African youth.
7. **Government support** – Governments and Non-Governmental Organizations (NGOs) are investing heavily in the sector by offering financial incentives for job creation.
8. **Risk mitigation** – Africa offers the opportunity to de-risk and diversify from over-concentration in other markets.

What Are Some of Africa's Leading Countries for BPO Services?

Leading North African Markets

1. **Egypt** – The most populous country in North Africa, with 102 million people, a 7.5% unemployment rate, 51.2% of Egyptians under age 25, one of the most youthful populations in the world, IT-enabled services industry estimated \$3.26 billion, 95,000 call center workers, over 500,000 graduates per year, multi-lingual BPO hub for English, French, Spanish, German, Arabic, Italian, and other languages.
2. **Morocco** – A population of 37 million, an 11.2% unemployment rate, 29.5 years median age, the only African country to have a free trade agreement with the U.S., the 5th largest GDP in Africa, and an estimated 100,000 call center workers in captive and BPO operations supporting EMEA (Europe, Middle East Africa) and North America. Multi-lingual BPO hub for English, French, Spanish, German, Arabic, Italian, and other languages.
3. **Tunisia** – A population of 12.3 million, a 16.82% unemployment rate, 10,000 IT engineers graduating annually, expanding BPO sector estimated at \$2 billion currently, digital services contribute to 7% of GDP and nearly 300 foreign companies with business interests in the country.

Leading Sub-Saharan Africa Markets

- 1. South Africa⁶** – The Sub-Saharan region's most mature market for BPO services, 61 million population, the only African country in the G20⁷, among the three largest economies in Africa, estimated 300,000 + call center employees, and a 35% average unemployment rate. Most call centers are in Durban, Cape Town, and Johannesburg.
- 2. Kenya** – A population of 54 million, one of the largest economies in East Africa, English official language, is among the most neutral English accents. The British education system, free and accessible primary education, and 130,000 university graduates annually. Kenya is poised for expansive international BPO growth. Most call centers are in Nairobi.
- 3. Ghana** – A population of 33 million, services sector largest contributor to GDP, third-largest U.S. exporter in Sub-Saharan Africa, over 70% literacy rate, over 20 captive and BPO call center operations primarily servicing local African CX market, expanding to support North America and Europe. The main hub for call centers is Accra, the capital.
- 4. Ethiopia** – A population of 115 million, an annual GDP growth rate of 10% in the last 10 years, a median age of 19.5 years, a government transforming country from agriculture to a services-based economy, among the largest recipients of foreign investments in Africa, growing tech and BPO sectors.
- 5. Rwanda** – A population of 13.7 million, one of the world's fastest-growing economies, traditionally an agriculture-based economy, shifting to tech, energy, financial services, and hospitality. The nascent BPO industry is not as scalable as other Sub-Saharan countries but well poised for growth.
- 6. Nigeria** – A population of 215 million, 9% unemployment, \$1.1 trillion GDP, largest economy in Africa, 16,000 BPO agents and growing, largest ICT (Information and Communications Technology) sector in Africa, over 91 million internet users (among highest in Africa), 53 million population between 18-35, an abundance of multi-lingual speakers.



Differences Between BPO Vendors in Africa

Outsourcers in Africa range from very small operations to mid-size providers to global conglomerates. As with any geography, [vendor selection](#)⁸ is critical. The market is poised for significant growth, hence why many BPOs are seeking entry.

However, a BPO's presence in Africa alone is not a differentiator. A key factor is the BPO's commitment to Africa, as well as its long-term plan and vision. Is the vendor, or site, an "African-born"

enterprise or a satellite location? What is the BPO's foundation in Africa? What is the BPO's understanding of the African market? These and other considerations are essential in choosing your partner(s).

U.S. market experience is critical! If you're considering BPOs in Africa for U.S. customer support, deep U.S. brand experience is essential. Your BPO should not "learn" how to support U.S. clients on your dime.

Avoid the joint-venture structure! Some BPOs seek market entry by establishing joint ventures with African call center operators. Such models have great risk, hence why so many brands decline the joint-venture arrangement. The preference is for the BPO to be the "owner and operator" of the site, not a sub-contractor.

Job creation is not enough! Africa offers a wonderful opportunity for brands to create jobs, but the customer experience, meeting and exceeding performance, staffing, and contractual [KPIs](#)⁹ are paramount. Please refer to our article, "[Impact Sourcing Requires Impact Performance](#)¹⁰," where we delve into this topic.

Careful due diligence is required! Brands seeking vendor relationships in Africa must scrutinize the company and site operations to ensure the best alignment for a long-term partnership. For the best customer experience, look to higher echelon BPOs that should be on par, if not better than the best BPO operations in the world.

For the best customer experience, look to higher echelon BPOs that should be on par, if not better than the best BPO operations in the world.

Concerns with African BPOs. While most African BPO markets are a long way from saturation, this is always a concern. However, given the level of unemployment and the sheer number of individuals applying for BPO positions, we predict that saturation will not be an issue in most African BPO markets for several years – possibly longer.

A bigger concern is the ability of African BPOs to groom leadership talent, given the newness of the market and current growth trajectory. African BPOs must invest heavily in management training programs, ensuring that frontline operations leaders, client services personnel, and trainers meet and exceed client expectations.

What Services Do African Outsourcing Firms Provide?

BPO is among Africa's fastest-growing sectors for job growth, encompassing customer service and other call center functions:

| Services offered by BPOs in Africa include: | | | Who is outsourcing to Africa today? | |
|---|--|--|--|--|
| <ul style="list-style-type: none"> Content moderation Customer service Data annotation Data entry and back office | <ul style="list-style-type: none"> Email Help desk Live chat Member services Outbound | <ul style="list-style-type: none"> Retention Sales SMS Software development Technical support | <ul style="list-style-type: none"> Airlines Automotive BFSI (Banking, Financial Services, Insurance) Consumer electronics Food delivery Healthcare | <ul style="list-style-type: none"> Hospitality Retail Rideshare Social media Technology Telecommunications Wellness |

Summary

As the BPO industry expands globally, diversity will become a greater source of competitive advantage. Newer labor markets are characterized by some of the best talent available in the global BPO community, along with improving education and career development standards.

Links:

- <https://www.grandviewresearch.com/industry-analysis/business-process-outsourcing-bpo-market>
- <https://www.un.org/ohrlls/news/young-people%E2%80%99s-potential-key-africa%E2%80%99s-sustainable-development>
- <https://africa.businessinsider.com/local/lifestyle/a-comprehensive-list-of-all-the-english-speaking-countries-in-africa/hdp1610>
- <https://au.int/>
- <https://www.stemcenter-africa.com/>
- <https://www.customerserv.com/blog/why-south-africa-for-call-center-outsourcing>
- <https://en.wikipedia.org/wiki/G20>
- <https://www.customerserv.com/blog/when-is-it-time-for-a-new-call-center-vendor-where-to-look-and-how-to-vet-the-right-partner>
- <https://www.customerserv.com/blog/call-center-metrics-kpi>
- <https://www.linkedin.com/pulse/impact-sourcing-requires-performance-nick-jiwa/>

Africa is poised for significant growth, as evidenced by the influx of new outsourcing contracts to African BPOs over the past 12-36 months from some of the most sought-after brands.

Africa is just beginning its expansion into BPO, and the region has high potential to become a preferred and even dominant outsourcing destination.



Nick Jiwa

Founder and President

Nick is an outsourcing industry veteran of 36 years and the founder of CustomerServ. He advises and guides leaders at Fortune 500 brands and companies of all sizes maximize "people performance" by outsourcing smarter with better-matched BPO partners and more successful outsourcing strategies. Nick is a founding member of the business process outsourcing (BPO) industry, a thought leader, matchmaker, CX champion, and impact sourcing advocate.



CustomerServ is a BPO industry pioneer, thought leader and matchmaking ecosystem that helps brands outsource smarter.

[Learn more at customerserv.com](https://www.customerserv.com)



BRAND SPOTLIGHT

woom Bikes

On a Mission to Make Millions of Children Fall in Love with Riding a Bike

In a recent conversation with April Obersteller, Vice President of Global Experience: EX + CX at woom, she shared how the brand approaches employee experience (EX) and customer experience (CX), its strategy for connecting with customers, and the “Magic Moments” that set children up for a lifetime of happy cycling.

woom specializes in designing and manufacturing high-quality bicycles for children. Their eye-catching designs, innovative features, commitment to safety, and boundless fun factor create an experience that is second to none. The brand was founded by two dads in a garage in Vienna, Austria in 2013 and has since expanded to over 25 countries around the world.

With just 1,400 bikes sold in the first year on U.S. soil, that number skyrocketed to more than 52,000 bikes in 2022. And, that number just keeps on growing! In March, the brand celebrated 10 years of “Magic Moments,” and has been recognized by *Inc.* magazine as one of the fastest-growing companies in America.



APRIL OBERSTELLER

Vice President of Global Experience: EX + CX

Execs In The Know: How would you describe woom's culture, values, and overall mission when it comes to serving customers?

April Obersteller: Our mission is to make millions of children fall in love with riding a bike... and make the world a better place. While everyone has a different role in making our mission possible, we all strive to bring our values of Joy, Courage, and Responsibility into every action that we do. How this plays out is what our culture is made of. The customer is in the DNA of our founders and the center of our WHY. We believe in what we are trying to do, and while we don't hit the mark perfectly, we always try to come back to this WHY.

EITK: What does a common customer success engagement look like, and on which channels are you and your team serving customers?

April: We are big fans of using the tool of LAMA: Listen, Acknowledge, Make a Statement, and Ask a Question. While all the touch points of this engagement are important, I think the first two are critical. Magic moments are also something we strive to hold space for and create during engagements with our customers. We are so lucky to be on the receiving end of our customers sharing their magic moment with their woom bike, and we love it when we get to also create that within our interactions with them.

We are currently engaging with our customers through phone, email, chat, social, video consulting, and in person at our showroom or at one of our many community events.

EITK: What's a magic moment at woom that has resonated with you?

April: I love this question! A magic moment that resonates with me happened about a year ago. It was right around Father's Day when a customer reached out to us with a beautiful email. He had lost his daughter, and when he was finally able to look through photos of her, he realized that so many moments of happiness captured had a woom in the background.





He told us how woom was part of his daughter's most joyous moments. The father also shared her values, and two out of the three values that he shared aligned with our company values. I love that we get to be part of these moments and that we are aligned with the people we are serving. I always get teared up thinking about this story, and I feel so lucky and honored to have this opportunity.

EITK: Where will the brand be focusing its efforts most in the next 6-12 months?

April: While there are many on the list, our biggest focus is getting to know our customers more and continuing to bring those insights back to our teams. Every day, our woomsters are asking what we are doing well at and what things we need to work on for our customers. This is something so special when it comes to woom, each one of them does care. It is our responsibility to make sure that when we learn about a friction point, we don't let it just stay with our team.

EITK: When it comes to technology, in what ways is the brand differentiating itself from its competitors to improve CX?

April: When it comes to technology or accessibility, that's where we're just having some fun with it. Our video consulting from a service side with our bikes is very popular. As you may know, some bike shops are known to be intimidating if you are not familiar with cycling. Additionally, we only sell direct-to-consumer right now, and this is one way we meet them where they are. Whenever they have a question about their bike, we're able to serve those customers in real-time vs. telling them to take their bike to a shop.

Our number one goal is to show up for them in an accessible way. The technology we have is great, but we are continuing to get more sophisticated. We haven't explored all the beautiful capabilities artificial intelligence (AI) and text analytics have to offer, yet. It's certainly on the roadmap, but there are some other priorities that we'll be diving into first.



EITK: Which CX trend or technology are you most intrigued by at the moment, and what's something you think every CX leader should be tracking?

April: We are at the stage of startup to scale up and we are a global organization. One of the challenges at this stage is continuing to stay close to the customer at all stages of the journey, even as we scale. I am always interested in ways how to accomplish this, and I don't think it is just one trend or one piece of technology, but rather a multi-connection solution.

For example, invest in voice of the customer (VOC) technology AND invite our customers to join a team meeting and share their feedback directly with our organization. With that being said, I think something every CX leader should be tracking is how in touch the full organization is with the customer. This can be as simple as asking each function, "How well do you know our customers, and what can I do to help close any gaps?" From that point, track that progress and impact.

EITK: Keeping employees happy and engaged is tricky. What are some of the things woom does to keep ESAT scores where they need to be among CX support staff and frontline agents?

April: At woom, we combined CX + EX at the core of our organizational structure, and I have the honor of serving these teams. Not only do we look at the entire journey for both of our customers – external and internal – we are constantly looking at the connection points between the two. These insights and connections are looked at for the full organization. Every learning we gain is matched with an action that is integrated with strategy and ownership.

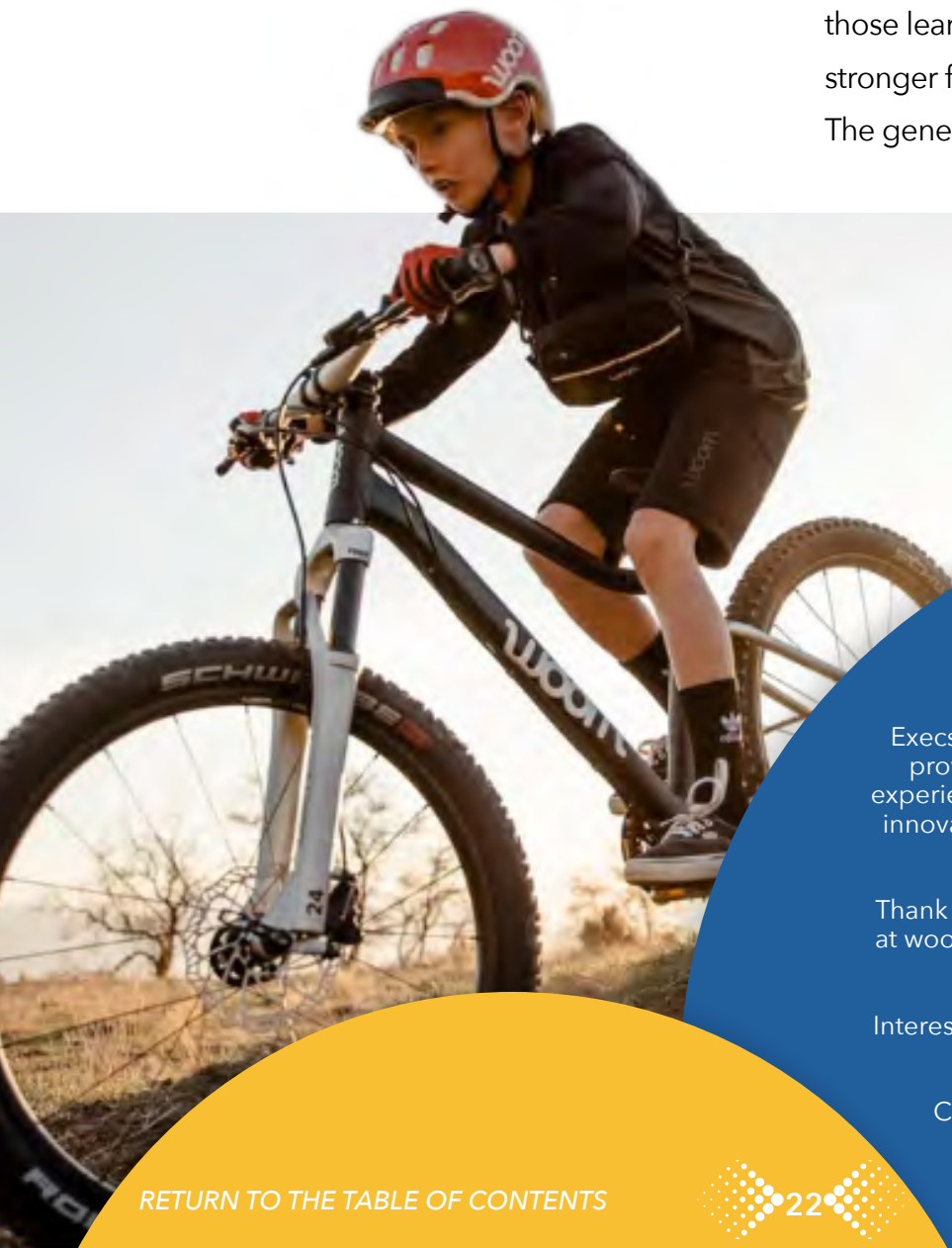
EITK: When you look back over the past 12 months, which success has meant the most to you?

April: Our organization has been through a lot of change over the last year, and we will continue to say YES to this ride, even with the bumps and turns. I think one of the biggest successes is how we are each still committed

to sharing feedback and doing something with this feedback. The participation rate for our annual Engagement Survey increased from last year, and we have matched actions and communication to the valuable insights we were given. We have also made immense progress in how we are listening to our external customers by launching our post-purchase survey for the EU with plans this year to continue adding ways our customers can talk to us.

EITK: Can you share what your involvement in the Execs In The Community community has meant to you thus far?

April: Community is everything. Getting to be surrounded by leaders who are in the CX world because of their relentless pursuit of service and magic moments is beyond helpful, especially to know you are not alone in this journey. Not only do we have the commonality of our WHY, we also get to be on the receiving end of learning all the different strategies and initiatives that we are working on. This allows us to bring each one of those learnings into our CX organizations and get stronger for our customers and our team members. The generosity of this community is endless. 🌟



Execs In The Know

Execs In The Know partners with brands that are providing outstanding customer service (CX) experiences. The Brand Spotlight Series showcases innovations and solutions to CX challenges faced by today's leading brands.

Thank you to April Obersteller and the entire team at woom for contributing to the Execs In The Know Brand Spotlight.

Interested in taking part in a future Brand Spotlight feature and sharing your story?

Contact us at info@execsintheknow.com.

LOOK WHAT IS NEW In The Know It All "KIA" Online Community for CX Leaders

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members
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of members
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The EX Factor: Identifying and Transforming Employee Journeys

by Execs In The Know

A fantastic employee experience brings advantages that extend beyond just attracting talented individuals.

The world of work is changing at an unprecedented rate – and it's never been more important to understand just what employees want and need. Recent disruptions have left a lasting impression, prompting employees to reevaluate the core aspects of their organizations and reflect on the significance and impact of work in their lives.

Employee experience (EX) is a journey that

begins the moment someone is recruited and ends when they move on to the next opportunity. According to [Gallup](#)¹, an exceptional experience is the result of “frequent, meaningful interactions over the course of their employment.” That experience is shaped by the employee’s manager, role in the organization, the team they work on, their workspace, and their well-being.

From achieving a healthy work-life balance and fair compensation to ensuring job security and aligning personal values with organizational goals, employees are questioning the very foundations of the companies they are associated with. This introspection has led them to a clear realization: it is high time to reshape their relationship with work and cultivate practices that prioritize human well-being. These practices not only enable individuals to overcome challenges but also empower them to thrive in the contemporary work landscape.

Many CX leaders are still figuring out the best ways to measure EX. And, it's worth the effort, because organizations that focus on improving EX have discovered that it not only enhances their teams' productivity, retention, and engagement, but is also the key driver of customer experience (CX) and overall organizational performance.

Let's dive in and explore how organizations can prioritize identifying and transforming employee journeys to unlock significant improvements in both EX and CX.

The Parallels Between EX and CX

A fantastic employee experience brings advantages that extend beyond just attracting talented individuals. When companies prioritize the well-being of their employees, it pays off in improved customer experiences as well.

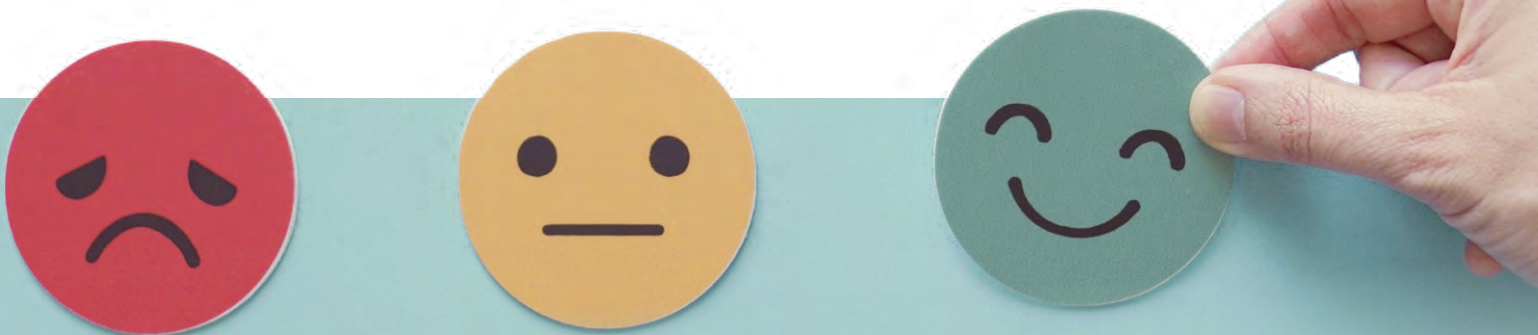
Consider the workforce challenges that currently trouble most companies: the lack of skilled workers who can meet the new demands of business, high turnover rates that result in costly recruitment and training processes,

and difficulties in engaging employees due to hybrid and other evolving work arrangements, heightened expectations for authentic diversity, equity, and inclusion practices, and significant shifts in workers' values.

Amid all these challenges, companies struggle to ensure they have a knowledgeable, experienced, and motivated workforce capable of delivering exceptional customer experiences. The importance of EX has grown significantly for customers. With more customers seeking to align their purchasing decisions with their values, they are increasingly interested in how companies engage with and value their employees.

Customers tend to prioritize doing business with organizations that treat their employees fairly, value their well-being, and prioritize their overall satisfaction. Furthermore, as employees interact more directly with customers, the nature of employee engagement has a greater impact on the overall customer experience. Let's take your sales team as an example: When they receive the support and growth opportunities they desire, they become more motivated to go above and beyond for their clients.

According to a study by PwC,² companies that invest in and deliver exceptional experiences to both consumers and employees can command a premium of up to 16% for their products and services. Moreover, researchers at MIT³ have found that companies in the top quartile of employee experience development achieve greater success in innovation, generating twice the revenue from their innovations compared to those in the bottom quartile. Additionally,



their industry-adjusted Net Promoter Scores (NPS) are twice as high, indicating stronger customer loyalty and advocacy.

What Is the Employee Journey?

Every individual embarks on a journey within your organization, starting from day one. Every single interaction, every single moment employees have with your brand influences whether they'll stay with your organization. From Instagram posts to Slack conversations, the experiences employees have with your organization truly do shape how they feel about it.

But have you ever wondered what this journey truly entails? And, more important, have you considered how you can enhance it? The

impact of an employee's journey cannot be underestimated. It holds the key to retaining exceptional talent, igniting their passion, and driving productivity. Studies reveal that organizations emphasizing employee experience **outperform their competitors by an astounding 122%.**⁴ So, why aren't more companies prioritizing the employee journey?

Employee journey mapping is a process that unravels every interaction and connection an employee has with your organization. A positive employee journey paves the way for engaged and efficient employees. When individuals feel supported and appreciated, they are inclined to go above and beyond in their work. It's a win-win situation for all involved.



Seven Stages of the Employee Journey

The impact of EX at every stage has a direct influence on both their performance and your employer branding.

When organizations view their current processes through the lens of employee experience, they may consider the following questions:

Attract: What aspects of our company culture do we emphasize to attract top talent?

Hire: Is our hiring process perceived as fair? Does it identify exceptional individuals?

Onboard: Do we validate the choice employees made to join us? Do new hires experience our values during the onboarding process?

Engage: Do our employees come to work with enthusiasm and dedication? Do we foster their strengths and sense of purpose?

Perform: Are our performance reviews unbiased and accurate? Are we setting higher expectations?

Develop: Do our top performers envision a future with us? Do we provide flexible and personalized career paths? Do we consistently support their career growth?

Depart: Who are our competitors in terms of talent? Why do our most talented individuals leave? Does our exit program leave a positive impression?

How to Optimize Your Employee Journeys

Let's dive into the steps you can take to shape an exceptional EX that brings about tangible and lasting benefits.

Start by Measuring Moments That Matter

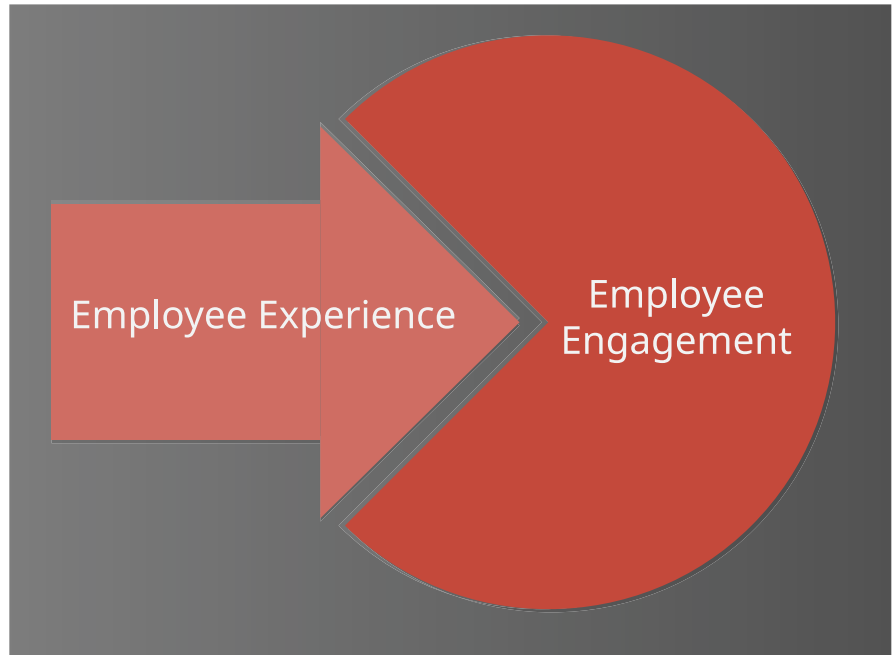
Mapping the employee life cycle allows you to gauge the employee experience, identifying key moments that drive engagement and areas that require improvement. This involves gathering comprehensive data, including primary survey insights and external feedback from social platforms. By taking this holistic and objective approach, leaders gain valuable insights into:

- Moments that hold the most significance for employees.
- Successful strategies and highlights worth replicating.
- Blind spots and factors that could lead to turnover.

When you study how employees navigate through the various stages of their journey within the organization, you may uncover shortcomings in specific areas. For example, your hiring process may be top-notch, but your onboarding program might fail to foster connections between new hires and mentors or colleagues. Alternatively, employees might be highly engaged but lack visibility into their growth and advancement opportunities.

Ensure Your EX Aligns with Your Brand's Purpose and Culture

This is where comprehensive analytics truly shine. Data-driven insights help leaders align their organization's unique purpose, brand, and culture with EX. When your employee journey truly reflects the values and mission of your



organization, every interaction with employees becomes authentic, inspiring commitment and driving performance.

Consider how your onboarding program showcases your commitment to customer-centricity if your core values revolve around customers. And, how does the customer factor into employees' performance evaluations?

When every aspect of the employee journey is deeply rooted in your organization's identity, it creates a cohesive experience where every interaction reinforces the greater whole.

Focus on Hiring, Training, and Developing Exceptional Managers

Your managers play a crucial role in delivering an outstanding employee experience. They are responsible for engaging employees, coaching for high performance, and fostering individualized long-term development. The quality of employees' experiences and the fulfillment of their basic needs are ultimately shaped by the leadership abilities of your managers.

Investing in proven manager development programs will prepare and inspire your managers to have effective conversations and

consistently help employees recognize their current and future value to the organization. Don't leave the most vital interactions between employees and employers to chance. Meaningful and effective hiring and onboarding processes are essential for setting people up for success. Equally important are the manager interactions focused on engagement, performance, development, and retention. Exceptional leaders understand the interconnected nature of these milestones and ensure that their employer brand promises are upheld at every turn.

Small Changes Make a Big Difference

There are numerous opportunities for employers to create tangible improvements and prevent the negative impact of low engagement. Employees, especially disengaged employees, often have clear ideas about what they would like to change in their workplace. They desire a better organizational culture, improved compensation and benefits, and a greater emphasis on well-being and work-life balance.

Managers can play a crucial role in enhancing employee engagement. To accomplish this, implementing a simple yet effective framework or checklist of actions enable managers to see and listen to their teams while consistently fulfilling their roles. A straightforward approach to enhancing employee engagement is for managers to have at least one meaningful conversation per week with their team members. These conversations can last as little as 15 minutes and serve as an opportunity to recognize employees' achievements and address their concerns. A Salesforce study found employees who feel a sense

of belonging are 5.3 times more likely to feel empowered to perform their best work⁵.

When people can feel connected and supported at work, they're more productive, efficient, and creative. And with most employees now experiencing work through a digital-first lens, it is the building of these digital employee touchpoints that will be crucial to any good experience of work.

Three Ways to Use Artificial Intelligence (AI) to Improve EX

By automating administrative tasks, personalizing learning experiences, and facilitating agile decision-making, organizations can unlock the full potential of their workforce, fostering a culture of engagement, growth, and continuous improvement.

1. Streamline Onboarding with Hyperautomation

Creating a positive first impression is key to a great employee experience. But the onboarding process can be overwhelming, involving multiple tasks like background checks, equipment requests, software access, payroll setup, and compliance training. Often, these tasks are scattered across various systems and external vendors, leading to delays in starting dates for new employees.

Hyperautomation simplifies the process for everyone involved in hiring. Instead of manually ensuring the completion of one task before moving on to the next, hyperautomation intelligently tracks the sequence of events and seamlessly progresses the process, ensuring a smooth and prompt onboarding experience for employees.



2. Use Large Language Models (LLMs) for Survey Insights

Brands can use LLMs and generative AI to gain valuable insights from employee surveys. These powerful tools analyze and predict data trends while providing coherent responses. Instead of relying on HR managers to manually handle email requests, AI can efficiently sort through emails, answer some questions, and redirect complex inquiries to the appropriate HR resource, ensuring faster responses.

Furthermore, LLMs and generative AI have potential applications in HR, such as analyzing employee satisfaction surveys and exit interview data. By identifying patterns and generating sentiment analysis, these AI systems help uncover valuable information about company culture. HR managers can leverage this data to develop strategies that enhance employee engagement and morale.

3. Help Employees Learn and Grow

AI solutions have the power to help employees grow and excel in their roles. By using AI, you can discover your employees' strengths and areas for improvement and provide them with the necessary tools and support to develop effectively.

This support not only boosts their confidence and competence, but also fosters a culture of engagement and commitment throughout your contact center. Showing genuine care and support for your employees' success and well-being has been shown to strengthen brand loyalty and increase staff retention and tenure.

Happy Employees Equal Happy Customers

Recognizing and reshaping the employee journey is crucial for achieving remarkable CX within organizations. By understanding the various touch points and interactions

that employees have throughout their tenure, brands can effectively address pain points, enhance engagement, and cultivate a positive work environment.

By prioritizing employee satisfaction and empowering them to deliver exceptional service, companies can create a virtuous cycle where satisfied employees translate into satisfied customers. Ultimately, investing in the identification and transformation of

employee journeys is a strategic move that propels organizations to deliver outstanding customer experiences. ✖

Exceptional leaders understand the interconnected nature of these milestones and ensure that their employer brand promises are upheld at every turn.

Links:

- 1 <https://www.gallup.com/workplace/389408/employee-journey-hands-guide.aspx>
- 2 <https://www.pwc.com/us/en/advisory-services/publications/consumer-intelligence-series/pwc-consumer-intelligence-series-customer-experience.pdf>
- 3 <https://www.avanade.com/-/media/asset/thinking/mit-research.pdf>
- 4 https://www.accenture.com/_acnmedia/PDF-64/Accenture_Strategy_Employee_Experience_Reimagined_POV.pdf
- 5 https://www.salesforce.com/content/dam/web/en_us/www/assets/pdf/datasheets/salesforce-research-2017-workplace-equality-and-values-report.pdf



The Prompt Toward a New Era of CX

Building better customer relationships and crafting more engaging and personalized experiences by tapping the prowess of this disruptive technology.

By: Sid Victor EVP - Digital, Product & Platform Services, Movate

AI's new inflection point, generative technology, has captured the world by storm and could be the next giant leap to unleash the innovation and productivity we need¹. The market will reach over \$109B by 2030, with a projected CAGR of 35.6%². ChatGPT's meteoric

rise is attributable to generative AI's capability to augment human effort. Enterprises envision building better customer relationships and crafting more engaging and personalized experiences by tapping the prowess of this disruptive technology.

The Future Is Unfolding

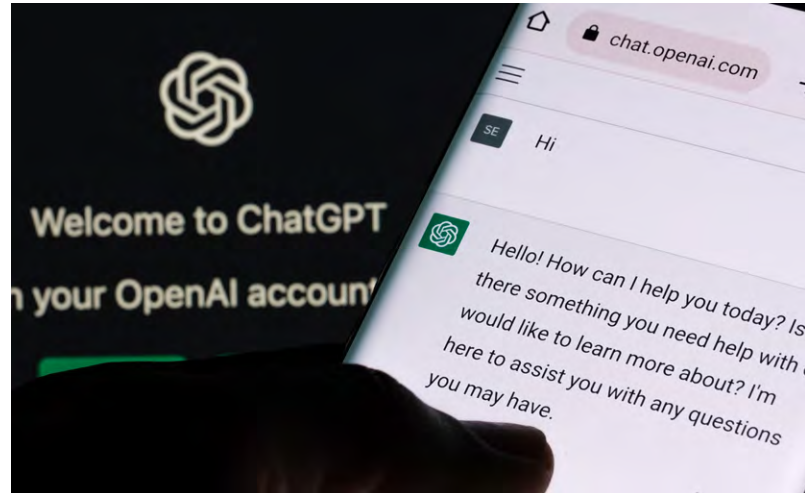
The talk of the town is about leveraging this technology with “human-in-the-loop” workflows, automating repetitive tasks, creativity, content creation, supercharging human support, and fine-tuning Large Language Models (LLMs) to specific domains, enterprise use cases, and customer scenarios.

Going by a survey of global business leaders, AI foundation models will play a pivotal role in enterprise strategies over the next three to five years³. An estimated 60%⁴ of IT leaders are looking to implement Generative AI. Existing tech service providers have their roadmaps chalked out to accelerate the advancement of existing AI platforms infused with Generative AI models. OpenAI has released API for accessing their flagship AI models. Vendors are exploring API integrations with the latest generative LLM models (like Stable Diffusion, DALL-E) and are inking partnerships with the pioneers to level up their CX capabilities.

The landscape of customer support strategy is witnessing a shift as benefits of Generative AI unravel use cases with a human-centric approach. Around 95%⁵ of enterprise leaders believe generative AI is ushering in a new dawn of enterprise intelligence. The game-changing technology will likely transform CX to provide unprecedented customer delight across service operations. ChatGPT⁶, for example, is known for being content-oriented, having deep language understanding, contextual response generation capabilities, and flexibility for open-domain conversations.

The X-Factor in Support

The critical question is this: How will the new advancement in AI outperform the present new-age technologies in a customer support context? What kind of newness does the technology deliver when measured against the yardstick of customer experience?



A piece from *The Wall Street Journal*⁷ cited how enterprises are leveraging the significant breakthrough in NLP to make customer service bots even smarter. Over the years, we witnessed how the journey has been from linear chatbots to cognitive, conversational AI, and now the step-up with generative bots – highly adaptable and interactive agents. LLM-powered chatbots facilitate conversations and tap knowledge gleaned and retained from previous interactions.

We now enter the language proficiency era that marks the start of language-driven generative models that are proficient in tackling customer support interactions at a humanized level of maturity. Generative bots deliver supreme contextual and intricate language understanding compared to costly, rigid, manually configured FAQ chatbots that return many articles to read. The “out-of-the-box” models mine deeper into the troves of data from knowledge bases and untapped touch points. Automation takes a turn for the better as models deliver deep predictive intelligence and content aggregation capabilities.

As human agents receive assistance from co-pilots, the technology reduces manual effort. It amplifies agent experience – NPS & CSAT monitoring, extracting relevant info from multiple articles, and generating human-like summaries. Gen AI-powered solutions deepen customer engagement via multi-lingual support, next-best actions, precise

recommendations, onboarding process, appointment setting, and scheduling. Decision-makers can accurately decode customer emotions and sentiments, use empathy reasoning, and topic clustering, and summarize content from various channels.

Deploying this technology will level up CSAT through hyper-personalized responses, broader customer reach across languages, faster resolutions, and scalability to meet expanding business needs in the future.

Be Wary of Blind Spots

A [survey](#)⁸ of IT leaders indicates that 67% are prioritizing generative AI for the next 18 months, and one-third have it as a top priority, but challenges remain. The advancement in AI is still in its nascent stages, with rapid rounds of experimentation and innovation in progress. A lot of research, validation, and testing iterations are underway.

Leaders need to be wary of the reputational risks and brand damage arising from **hallucinated responses** ([coherent nonsense](#)⁹)

amidst sensitive customer interactions – for example, providing a false credit card interest rate to a customer seeking information.

Brands must address biases, data privacy laws, copyright issues, human-verified output, transparency, security audits, and diverse and inclusive representative data sets through an ethical and responsible AI governance framework.

With all the buzz around the new AI arms race, clients need to ask service providers the tough questions around security, accuracy, and governance. These include:

- Are sufficient data guardrails in place?
- What's the differentiating factor of a particular service offering? Can other vendors also replicate the results with the same API?
- Is this the "real deal" integration with a high-profile generative model or another duplicate?
- Is this LLM trained in specific domain use cases (like telecom, contact center) and possess topic-centric grounding?

What Should Contact Center Leaders Do?

Start the journey by working with the right technology vendor to:

- ✦ Conduct an **enterprise maturity assessment** to see how to integrate generative AI into the current ecosystem.
- ✦ Assess current **data & integration** requirements.
- ✦ Ascertain **top use cases** to see early success.
- ✦ Chart a detailed **enterprise roadmap** involving data integration & technical architecture.

The disruption is unlike any other in the last decade or two & now is the time to realize its benefits.





Consider domain-specific large or a small parameter set to train the LLM models for successful outcomes. Such LLM models trained on a small set of parameters would outperform larger models at less cost. Accurate, complete, unified data and enhanced cybersecurity measures are paramount for trustworthy innovation.

David Truog¹⁰, a principal analyst specializing in technology and design at Forrester Research Inc., stated it's apt to do some experimentation, but too early to deploy mission-critical applications out of this. Simple use cases like self-service would be an ideal starting point to build on. Leaders needn't rush, but assess the situation and explore partners' expertise before embarking on significant initiatives.

What Should Contact Center Leaders Do?

Customer service and support leaders need to capitalize on this opportunity to extract the maximum value for the contact center. Start the journey by working with the right tech vendor to:

- Conduct an enterprise maturity assessment to see how to integrate generative AI into the current ecosystem.
- Assess current data and integration requirements.
- Ascertain top use cases to see early success.
- Chart a detailed enterprise roadmap involving data integration and technical architecture.

The enterprise-grade generative AI tool stack is comprehensive and customer service leaders need not get bogged down with the enormity of the task. Organizations like Movate offer customized packages to get started.

Here are some key foundational steps in the journey to build a Generative AI roadmap.

Define and document a formal enterprise AI policy that covers ethical AI guidelines with audit mechanisms to verify outcomes.

Find the right use cases. Use data analytics from CRM/ITSM systems to narrow down on low-complexity, high-impact use cases. ChatGPT's information-summarization capability can synthesize distributed customer feedback, NPS & CSAT data to provide meaningful insights.

Evaluate "Build" vs. "Buy" decisions, as it takes a wider team effort to make the journey successful. Given the diversity of technology and growing industry-specific solutions, defining the adoption journey can be daunting. Investing in business differentiation features on top of standard GPT-enabled platforms will be key for proper outcomes. Start using secure GPT-enabled CRM platforms trained on customers' internal data with knowledge curation and contextual training.

Strive for accuracy and build trust. Most organizations have data integrity problems; the existing knowledge base needs enrichment and curation before deploying it to train the model. Establish a KM governance framework focusing on selection, enrichment, and training process with apt approval workflows and human validation – fine-tune first-draft ChatGPT responses for accuracy in subsequent iterations. Managing the algorithmic dial is critical for accurate outcomes.

Define the security governance process with a human-integrated holistic approach. Governance entails architecture, data readiness, model training process, data residency, and authentication techniques. End-to-end encryption, SSO, MFA, ISO & IEC adherence, GDPR & CCPA compliance are table stakes.

The last step is organizational change management. Communicate enterprise adoption plans, create bridging courses, and help employees and partners to align with organizational goals in advance.

A Watershed Moment

The disruption is unlike any other in the last decade or two and now is the time to realize its benefits. [Gartner](#)¹¹ says innovation in AI is accelerating and creating numerous use cases in generative AI across industries. With a combination of cloud and new-age technologies, generative AI is set to open new frontiers to bridge the physical and digital worlds. A pivotal moment in AI poised to reinvent business and revolutionize CX is unfolding.

Though a ton of excitement is in the air, leaders need to communicate the benefits of AI's new dawn to their support teams; they need to address the market disruption in the new future of work and quell the collective anxiety around the buzzy technology.

Here's an excerpt from ChatGPT's response on what the future of CX would be with generative AI:

"...Overall, the future of CX with generative AI holds promise for enhancing personalization, efficiency, and customer satisfaction. As the technology advances, it will be crucial to balance automation and human touch, creating seamless and meaningful interactions between businesses and their customers."

Links:

- 1 https://blogs.gartner.com/andrew_white/2023/04/07/generative-ai-could-be-the-trigger-for-the-productivity-wave-we-need/
- 2 <https://www.grandviewresearch.com/press-release/global-generative-ai-market>
- 3 <https://newsroom.accenture.com/news/accenture-technology-vision-2023-generative-ai-to-usher-in-a-bold-new-future-for-business-merging-physical-and-digital-worlds.htm>
- 4 <https://www.salesforce.com/news/stories/generative-ai-research/>
- 5 <https://newsroom.accenture.com/news/accenture-technology-vision-2023-generative-ai-to-usher-in-a-bold-new-future-for-business-merging-physical-and-digital-worlds.htm>
- 6 <https://www.forbes.com/sites/forbestechcouncil/2023/01/05/generative-ai-implications-for-customer-experience/>
- 7 <https://www.wsj.com/articles/companies-tap-tech-behind-chatgpt-to-make-customer-service-chatbots-smarter-11674509622>
- 8 <https://www.salesforce.com/news/stories/generative-ai-research/>
- 9 https://www.forrester.com/blogs/beware-of-coherent-nonsense-when-implementing-generative-ai/?utm_source=forbes&utm_medium=pr&utm_campaign=cx
- 10 https://www.forrester.com/blogs/author/david_truog/
- 11 <https://www.gartner.com/en/articles/beyond-chatgpt-the-future-of-generative-ai-for-enterprises>



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EVP - Digital, Product & Platform Services

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Management & Enterprise Support Services at Movate (formerly CSS Corp). He has 19+ years of experience in the IT industry, all of which have been with Movate. He is responsible for hunting new logos, providing consultative expertise for clients and internal stakeholders, pipeline generation, business and services transformation, identifying and creating forward-looking solutions, and developing innovative differentiators in support.



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Customer Care and Fulfillment
iRobot



Stacy Spikes

Co-Founder and CEO
MoviePass



KIA ONLINE COMMUNITY MEMBER SPOTLIGHT



NATHAN BOBAY

Senior Manager,
Customer Solutions
at Delta Faucet Company



Nathan Bobay is a Senior Manager, Customer Solutions for Delta Faucet Company, leading the Consumer Support team

which is responsible for overall contact center operations leadership. His team completed certification of the JD Power & Associates Customer Service Excellence Program in 2022 and 2023. He is a lifelong Hoosier and resides in Indianapolis. He believes the CS/CX industry has a unique opportunity to uplift the lives of those it impacts, and that business is a force for good in society. Execs In The Know recently caught up with Nathan to discuss the brand's culture and mission, the most important aspects of building customer loyalty, and the next big changes coming to the industry.



Applying Best Practices Focused on Continuous Improvement

Technology will progress and people will have to evolve with it.

Execs In The Know (EITK): Can you share how you found yourself in a career dedicated to serving the interests of customers?

Nathan Bobay: I peeled back my career onion to figure out what I liked doing, which is more people-oriented work. I studied Accounting,

worked in Finance, then got an MBA in International Business. I had a great leader who knew that I wanted to get into leadership, and they suggested International CS, which eventually led to my role today. I get most excited about building relationships and finding connectedness in people and ideas.





EITK: Can you share a little bit about Delta Faucet Company, particularly regarding the culture and mission as it relates to CX?

Nathan: Delta Faucet Company has been in business since 1954. The brand has a wonderful origin story from our founder, Alex Manoogian, and prides itself on selling quality products backed by great service, and has a culture of continuous improvement. Our executive leadership set a goal several years ago that was focused on becoming an Industry Leader in Service. We feel we have delivered on that goal by winning back-to-back JD Power Customer Service Excellence Program Awards in 2022 and 2023. We hope to sustain this success while applying best practices focused on continuous improvement. I started in Financial Analysis, then International Finance, then International CS to now Lead the Consumer Support Team within our Customer Solutions Department for almost eight years: Contact center operations and leadership, vendor management training, Quality Assurance, KM, Data Analytics, and CRM support.

EITK: When it comes to creating exceptional customer care/customer solutions, which critical ingredients do you think most often get overlooked?

Nathan: People connections, building trust, and showing you care. It's easy to get caught up on performance and metrics. Building relationships is foundational to delivering results. People and High-Performance Teams are two of our company's core values and they are defined by encouraging continuous development and placing value on building trust.

EITK: What is your approach to the professional development of your frontline staff?

Nathan: To show them the potential career paths they have, make sure compensation is adequate and they have the tools and training they need to succeed in their jobs, and support them with leaders who care, as well as surround them with a culture of service excellence. The resources, activities, and best practices that have the biggest impact are the Buddy Program, 1:1s with their supervisors, weekly events, and rewards/incentives.

EITK: Which parts of the brand experience (be they in-store or online) are most important for building customer loyalty?

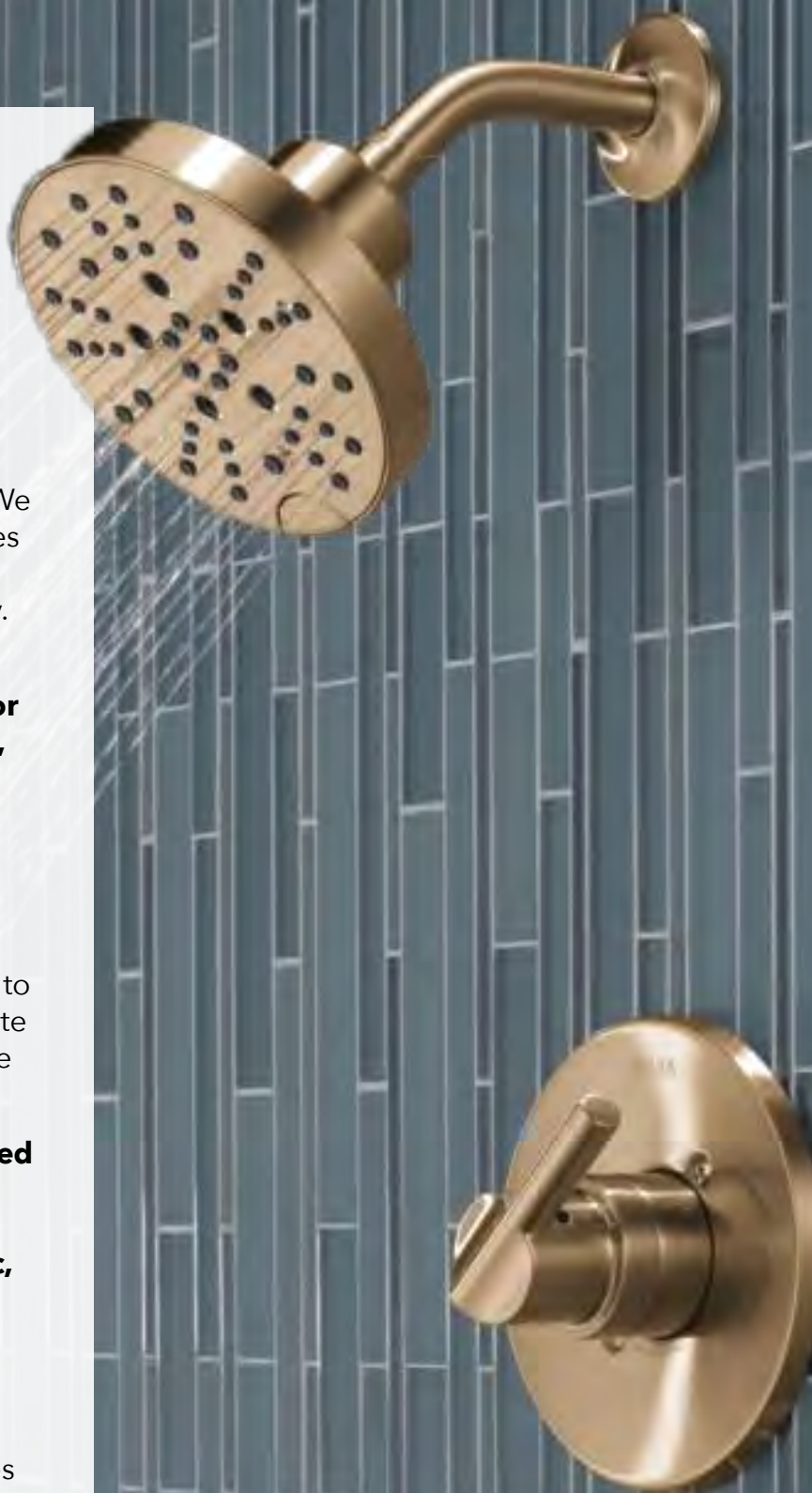
Nathan: To have products that meet the consumer's needs and be easy to do business with (ability to find what they need). There is a lot of effort put into consumer research studies and collecting survey feedback in the market. We sell through multiple channels, and our websites have easy-to-use features to shop by room, product type, and style, as well as where to buy.

EITK: What are some of the most exciting customer solutions and CX areas of focus for you for the remainder of 2023 and beyond, and what are the expected impacts on your customers?

Nathan: Continued investments in the agent experience, the online consumer experience, analytical tools to gather feedback and better utilize existing data, and additional capabilities to make doing business with us easier. Our ultimate goal is to give customers peace of mind that we will take care of them if they need us.

EITK: You have no doubt seen and experienced a lot of innovation and change over the years. What do you see as the next big change coming to the industry, be it strategic, operational, technological, or otherwise?

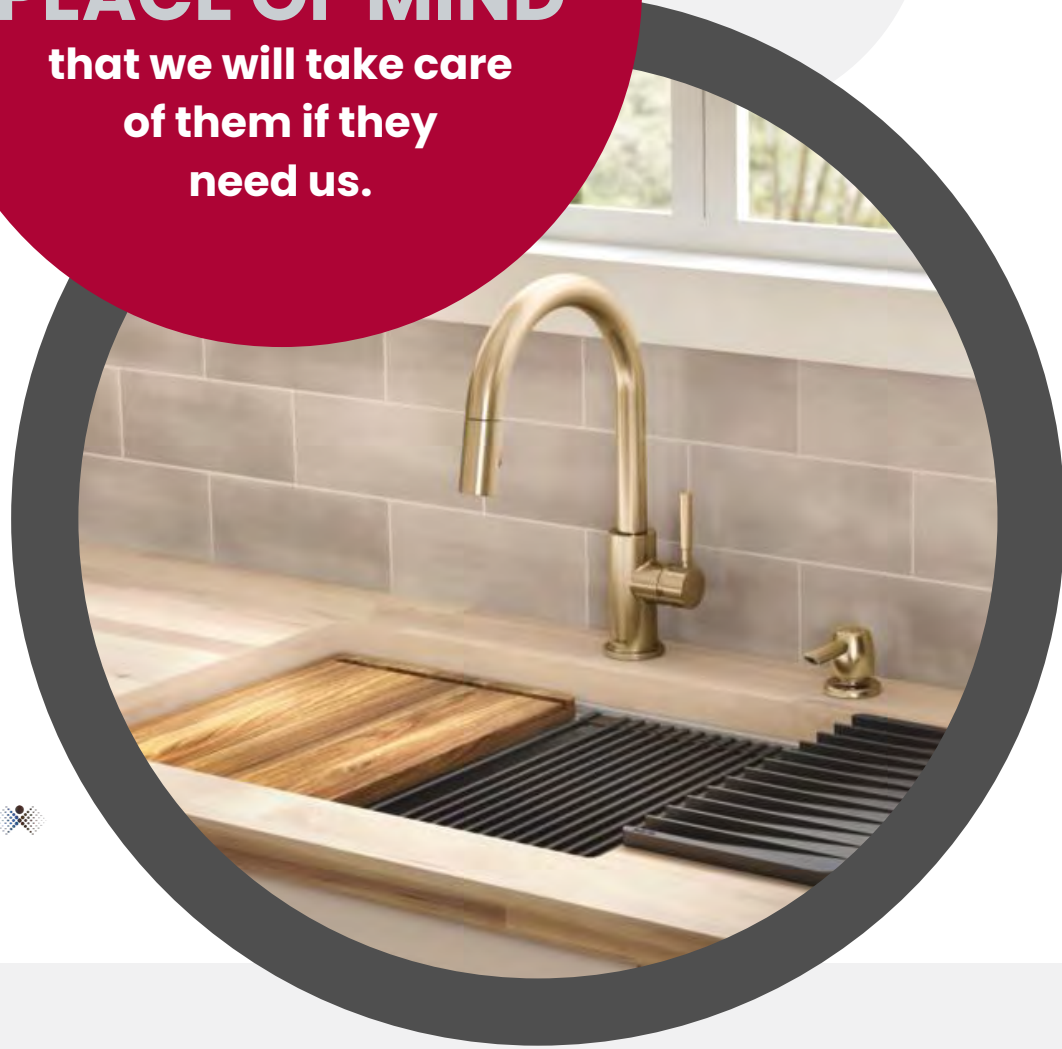
Nathan: I see two parallel paths continuing that are supplemental to each other, which are People and Technology. Companies will keep creating innovative products and services (technology) and consumers (people) will need customer service experts (people) to support them wherever they are in their journey. Technology will progress and people will have to evolve with it.



EITK: You've been active in the Know It All "KIA" Community since joining. As a member of the community, what do you enjoy most, and what benefits do you see in the community for other CX professionals? What value has come from your involvement?

Nathan: I really appreciate the online forum. It is a great place to connect with other CX professionals that have experience with the same strategic hurdles. The value is making connections with other service-minded people and their willingness to help each other. It is a well-connected industry, and we all have very similar challenges. 🌐

Our ultimate
goal is to
give customers
PEACE OF MIND
that we will take care
of them if they
need us.



Execs In The Know

Thank you to Nathan Bobay, Senior Manager, Customer Solutions at Delta Faucet Company, for his leadership, participation, and insights. To connect with Nathan, or to participate in the wider conversation, consider joining the Execs In The Know "Know It All" (KIA) Community. The KIA Community is a private, online community designed exclusively for CX Leaders at consumer-facing brands. Come learn, share, network, and engage to innovate.

Want to learn more
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Measuring AI Performance: Are You Leveraging LLMs' Analytic Capabilities?

Understanding how your artificial intelligence (AI) is performing requires effective analytics tools, a strong grasp of conversational design practices, and a clear sense of your business goals and your customers' intents.

By Mike Myer, CEO and Founder, Quiq

While a lot has shifted in the automation landscape with the widespread adoption of ChatGPT and other Large Language Models (LLMs),¹ one thing hasn't changed. Whether you're building a Natural Language Understanding (NLU) bot or an LLM-powered AI Assistant, you need to understand how your AI is performing.

Anyone who has spent a cursory amount of time attempting to build, deploy, measure, and optimize an automated AI Assistant knows that not all resolved conversations are created equal.

Did the customer leave because they got their issue resolved? Or did they give up because your bot was giving them the same unhelpful answer over and over?

While it might seem impossible to sift through mountains of conversational data, there are a handful of analytics tools and conversational design best practices that can go a long way to ensuring you're measuring – and optimizing – what matters.

Let's dive into what those tools and best practices are, starting with techniques to measure customer satisfaction (CSAT).

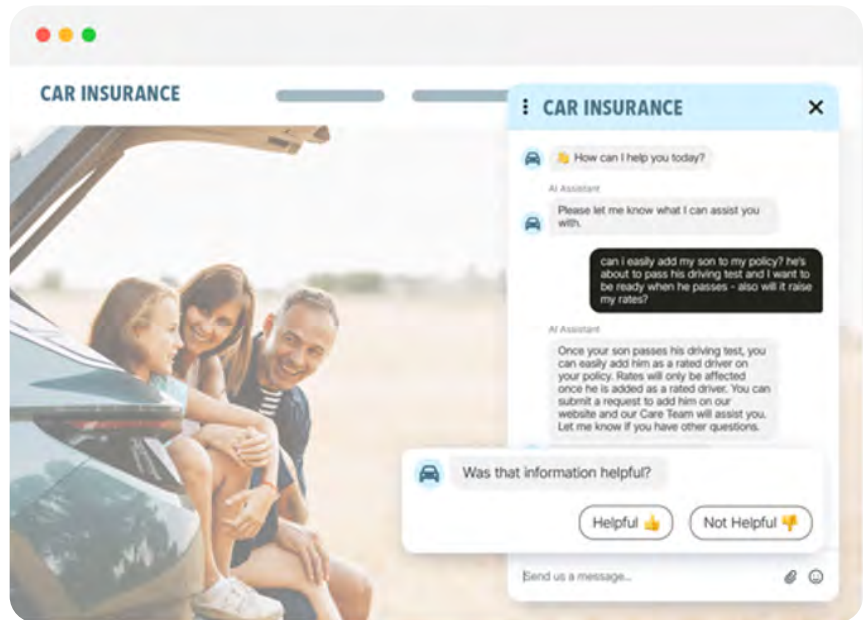
How to Measure CSAT and Collect Customer Feedback

Analyzing CSAT scores helps you gauge your conversational AI's success and identify improvement areas – surveys and thumbs-up feedback mechanisms are effective techniques for measuring customer satisfaction.

Integrating short surveys at the end of conversations or providing a thumbs-up option during conversations is powerful. It allows customers to express their level of satisfaction easily and directly within the context where they are already engaged. And because you can do it conversationally, you can garner better response rates and more immediate feedback.

We'll cover a wide range of measurement techniques below, but it's important to not overlook the simplest technique when trying to understand if an AI Assistant answered the customer's question: Ask them.

- 1. Use multiple formats.** For instance, CSAT, free form, 1-5 stars, was this helpful yes/no, thumbs up/thumbs down.
- 2. Collect channel-appropriate feedback.** Is your primary channel short-lived like web chat, where the customer may close their browser tab and disappear, or is it a more persistent channel, like Short Message Service (SMS), where the conversation is more asynchronous in nature? Your timing should be partially dictated by the channel of engagement.
- 3. Have a clear conversation architecture strategy in place from the beginning, so you can collect feedback at critical moments.** Whether that's after an FAQ answer is served or a conversation has been closed, it is going to be vital to segment this feedback by customer paths or goals.



What Are Goals and How Can You Define Them?

Setting clear goals for AI performance measurement is crucial for tracking progress and evaluating success.

While it's great when customers tell you exactly what they liked or didn't like about their experience, it's all but guaranteed that you're going to get less than a 100% satisfaction rate on your customer satisfaction surveys.

This could be because your AI Assistant delivered the appropriate message, but a customer didn't like its intent, which may be company policy. Or perhaps it correctly identified a product the customer is looking for, but that product is out of stock, and the customer is still unhappy.

On the other hand, many users never even reach a point with your AI Assistant to trigger a survey.

That's why it's important to be able to use different points in a customer's journey as a means to silently measure the efficacy of your experience – whether it's having your AI Assistant ask a certain question, collect a piece of data, or send a particular response.

Ideally, you should be able to measure and report on key milestones in the customer journey to understand how many customers engaged with a particular part of your experience, and how many had a successful or unsuccessful outcome.

For example, if you've deployed a generative AI Assistant designed to help customers track and reschedule furniture deliveries, you'd like to know how many customers attempted to track their order, how many successfully rescheduled their order, and how many never successfully entered their order details and got escalated to a live agent.

While the above might seem straightforward, at Quiq, we've learned there is a non-trivial amount of conversational design work that goes into determining what possible outcomes constitute success or failure – not to mention how to think about what it means for a user to "attempt" something.

The tooling you're using should be flexible enough to allow you to cover the wide range of ways you may need to track your conversations.

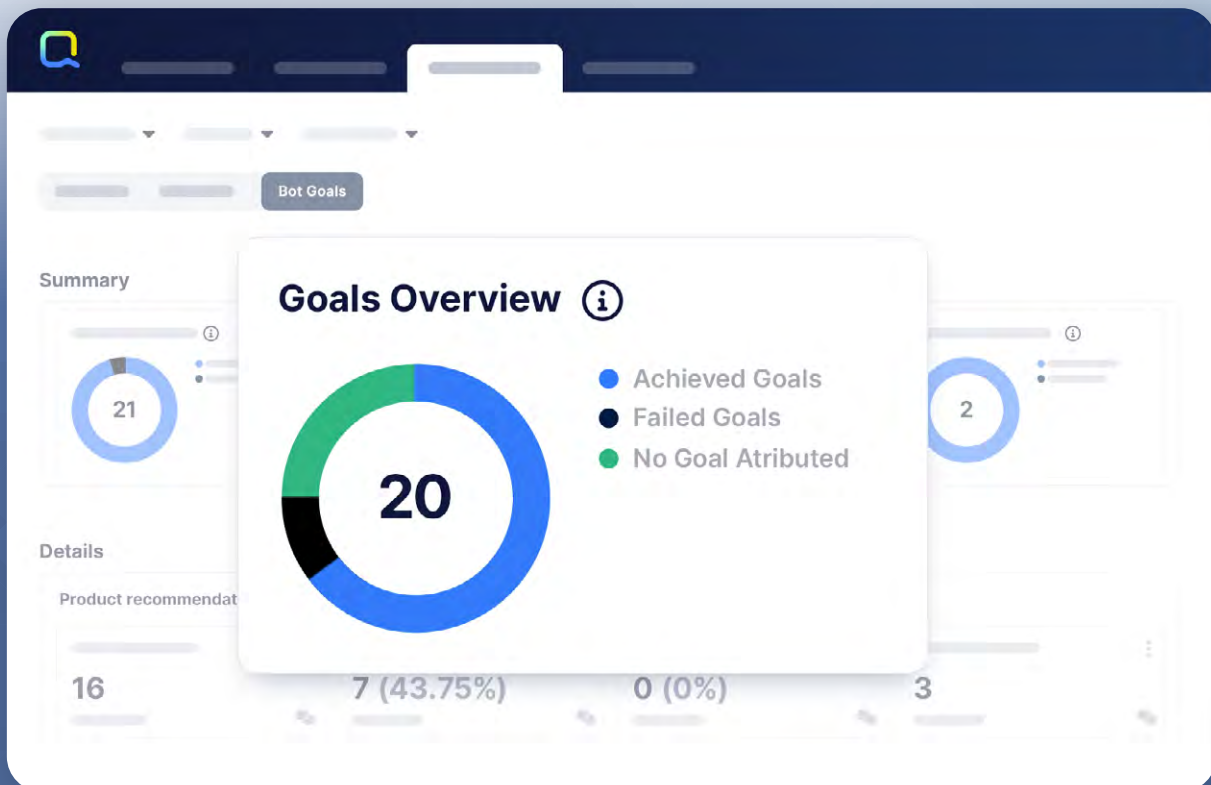
While channel surveys add massive value, companies should also send out Customer Effort Score (CES) surveys several days after the interaction to capture the CES across all channels in the service journey.

How to Find Where Customers Are Giving Up

Your AI Assistant most likely has several jobs it's designed to accomplish, whether that's providing a product recommendation or helping rebook a customer's flight.

But don't focus exclusively on analyzing these user journeys at the expense of having a high-level understanding of how users are engaging with your AI Assistant – and what's changing over time.

A good set of conversational AI tools should enable you to get a bird's eye view of your experience and allow you to dive into the weeds, ideally at the individual conversation level, to understand exactly what's going on in your experience and how customer usage and needs evolve over time.



While there are a seemingly limitless number of ways to think about analyzing your AI Assistant, there is a handful of ways that are worth considering.

Traffic

Start by analyzing traffic changes. Are you noticing more customers going down a particular path or less? Can you dig into groups of conversations at these impacted points and understand what's changed?

Customer Intent

Often related to traffic, you can identify shifting customer intent by looking to see if customers are asking different questions than they were previously. Is your AI Assistant handling this shift well, or do you need to update the AI Assistant?

Dropoff

Is the completion rate lower at certain key points in your experience? Can you visualize this at a glance, with a set of funnels, or a Sankey diagram?

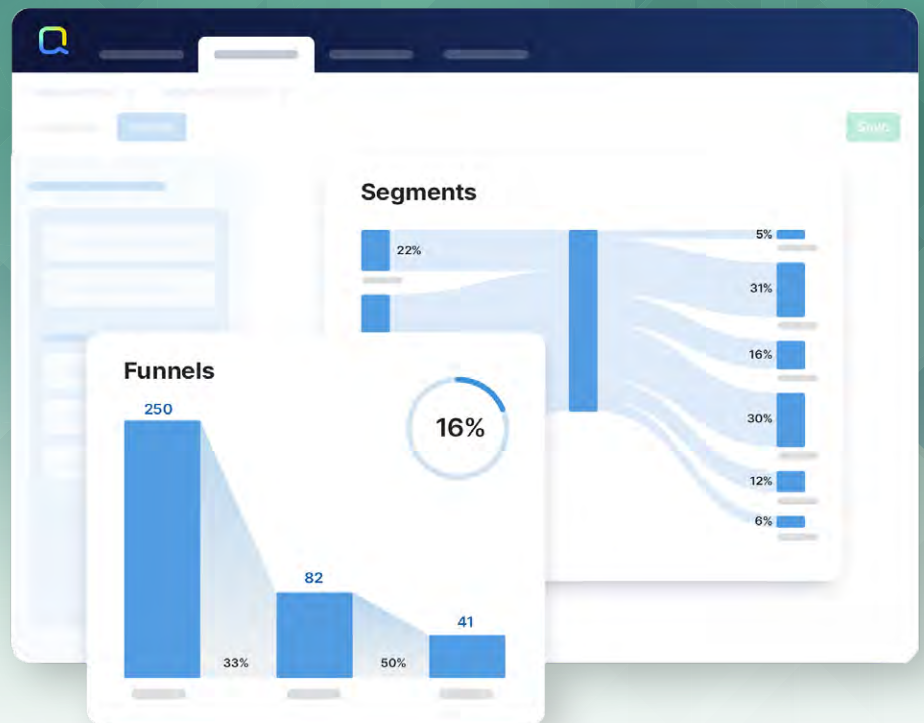
Sentiment

Is there a change in customer mood? Whether that's during the conversation or due to key facets of your experience, this is an important source of performance knowledge.

Regardless of where you look to find where customers are dropping off, it's important to have a powerful set of analytics tools that let you visualize, measure, and drill into conversations in a manner appropriate to your team's workflow.

What's Different About LLMs?

While much of the above still applies to analyzing AI Assistants that are powered by LLMs, this emerging AI tech presents unique measurement opportunities.



For one, LLMs do a great job of reading and understanding. You can harness this power by developing evaluation and scoring techniques via prompting that will allow you to measure the effectiveness and helpfulness of your AI Assistant.

What if you could measure CSAT without needing to ask for it? Or what if you could identify topics over time where gaps in the knowledge base exist so that you could add to them?

These types of things are possible with the right prompting and context fed into an LLM. Here are other ways to make performance measurement easier with LLM-powered AI.

Have a Large Language Model Review LLM Conversations

Not only can LLMs power the conversation, they can also analyze it both throughout the experience and upon its conclusion. You can use LLMs to help measure and evaluate the performance of AI Assistants. For example, what was the user's sentiment in the conversation and how did it change from beginning to end?

Measure Sentiment Shifts

Rather than simply measuring overall sentiment, layering in sentiment shift allows you to see a more nuanced and complete picture of the AI Assistant's conversation from the customer's baseline to the conversation's completion.

You can also use sentiment analysis at specific points in time to guide the users directly to a live agent if the sentiment score reaches particular levels.

Summarize Conversations

Transcripts can become long and tedious to read through. Instead, use an LLM to read and summarize a transcript before handing it off to an agent. Or simply use it to summarize a conversation for record keeping. Auto summarization saves time for agents and analysts alike.

How to Deploy and Manage Changes Safely

When you're building an AI Assistant, you need to not only consider how your answers will appear, but how they appear and change over time with new phrases people might use or updated policies and knowledge base articles.

Use Test Sets to Monitor and Improve AI Assistant Responses

Here's a scenario: Your knowledge base article addresses how to accomplish something within your app. But then you add functionality and a corresponding knowledge base article.

You can test it out with new user questions to see how it answers, but you're also going to want to know that the things people were asking before this change are still being answered correctly and that any overlap or contention between articles is still handled well in your generated responses.

This is where test sets come in.

You can run a set of tests where you know the appropriate answer both before and after adding this new article. Make sure the responses continue to look strong even after adding in new knowledge base information.

And the best part? You can use an LLM to automate this process.

Tell the LLM the types of questions users ask, track the responses your AI Assistant gives, measure those responses, and set baselines, then run them again after the new article is added.

```

DetailsCardOnHover = showOnHover(UserDetailsCard);

Link = {
  href: userLink,
  type: 'button',
  avatar,
  className: {
    className: styles.container,
    includeAvatar: {
      userDetailsCardOnHover:
        user={user}
        delay={CARD_HOVER_DELAY}
        wrapperClassName={styles.avatarContainer}
      <Avatar user={user} />
    }
  }
};

const {className: {
  styles: linkContainer,
  inline: styles.inlineContainer
}} = styles;

const {className: {
  styles: {
    userDetailsCardOnHover: user={user}
    delay={CARD_HOVER_DELAY}
    link:
      to={{ pathname: buildUserUrl(user) }}
      className={className(styles.name, {
        [styles.alt]: type === 'alt',
        [styles.centerName]: isSecondaryLink,
        [styles.inlineLink]: inline,
      })
    }
  }
} = {children || user.name}
</Link>
{isSecondaryLink
  ? null
  : {
      href={secondaryLink.href}
      className={className(styles.name, {
        [styles.alt]: type === 'alt',
        [styles.secondaryLink]: secondaryLink,
      })
    }
}
{secondaryLink.label}
</div>

```

```

147 </ul>
148 </div>
149 );
150 }
151
152 renderWhatsNewLinks() {
153   return (
154     <div className={styles}
155       <div className={styles}
156         <ul className={styles}
157           {this.renderWhatsNewLink()}
158           {this.renderWhatsNewLink()}
159           {this.renderWhatsNewLink()}
160           {this.renderWhatsNewLink()}
161           {this.renderWhatsNewLink()}
162           {this.renderWhatsNewLink()}
163           {this.renderWhatsNewLink()}
164           {this.renderWhatsNewLink()}
165         </ul>
166       </div>
167     );
168   }
169
170 renderWhatsNewItem(title, url) {
171   return (
172     <li className={styles.footer}
173       <a href={trackUrl(url)}
174         target="_blank"
175         rel="noopener noreferrer"
176       >
177         {title}
178       </a>
179     </li>
180   );
181 }
182
183
184 renderFooterSub() {
185   return (
186     <div className={styles.footerSub}
187       <Link to="/" title="Home - Unsplash"
188       >
189         <img alt="Unsplash logo"
190           type="logo"
191           className={styles.footerSubLogo}
192         />
193       </Link>
194       <span className={styles.footerSubLogo}
195       />
196     </div>
197   );
198 }
199
200 render() {
201   return (
202     <div className={styles.footerGlobal}
203       <div className="container">
204         {this.renderFooterMain()}
205         {this.renderFooterSub()}
206       </div>
207     );
208   }
209 }

```


Do your new responses continue to track well against the metrics? Awesome! Now you have more data for customers to interact with, you know you can answer additional questions, and you can be confident that the answers generated continue to be effective and accurate.

In addition to testing, you want to be able to monitor events as they happen over time within conversations, so you can pull out user phrases and see how customers' behavior and language might change over time.

By recording events in your AI Assistant conversations, you can add these to test sets, build out test cases for them, and generally strengthen the robustness of your AI Assistant's responses.

Final Thoughts

Understanding how your AI is performing requires effective analytics tools, a strong grasp of conversational design practices, and a clear sense of your business goals and your customers' intents.

But LLMs now present additional measurement opportunities—from leveraging them to analyze conversations and evaluate performance, to measuring sentiment shifts and automating tasks like conversation summarization.

By continuously monitoring events and recording user behavior within and across conversations, you can strengthen your AI Assistant's responses and improve its overall performance.



Mike Myer

CEO and Founder of Quiq

Mike is the Founder and CEO of Quiq. Before founding Quiq, Mike was Chief Product Officer & VP of Engineering at Dataminr, a startup that analyzes all of the world's tweets in real-time and detects breaking information ahead of any other source. Mike has deep expertise in customer service software, having previously built the RightNow Customer Experience solution used by many of the world's largest consumer brands to deliver exceptional interactions.

RightNow went public in 2004 and was acquired by Oracle for \$1.5B in 2011. Mike led Engineering the entire time RightNow was a standalone company and later managed a team of nearly 500 at Oracle responsible for Service Cloud. Before RightNow, Mike held various software development and architect roles at AT&T, Lucent and Bell Labs Research. Mike holds a bachelor's and a master's degree in Computer Science from Rutgers University.



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The Rise of Environmentally Conscious Consumers: CX Reimagined for Sustainability

by Execs In The Know

As the world looks for more environmentally friendly ways to live, many consumers are increasingly aware of the impact their purchasing decisions can have on the planet.

In recent years, consumer behavior has significantly shifted, as more individuals prioritize sustainability and environmental consciousness in their purchasing decisions. The rise of eco-consciousness has brought a new wave of responsibility to the world of business. And, as a result, organizations are now reimagining customer experience (CX) for sustainability's sake.

This article will explore the reasons behind the surge in environmentally conscious consumers and discuss how organizations can reimagine their CX practices to cater to this growing market segment.

A Shift in Consumer Behavior

In 2021, the IBM Institute for Business Value (IBV) found that 93% of global respondents¹ said the pandemic had influenced their views on sustainability. And more recently, environmental issues have become even more important.

People are becoming more conscious of how their choices impact the planet and are actively seeking eco-friendly alternatives. This shift in consumer behavior is driven by various factors, including greater access to information, the influence of social media, and the realization that individual actions can make a difference.

- According to a 2020 McKinsey U.S. consumer sentiment survey², more than 60 percent of respondents said they'd pay more for a product with sustainable packaging.
- Consumers across all generations – from Baby Boomers to Gen Z – are now willing to spend more for sustainable products.

Consumer Statistics About Sustainability

Are consumers making decisions based on a brand's sustainability practices? The following data shows that's exactly what's happening:

- According to Gallup, close to two-thirds³ of U.S. adults are concerned about global warming, with 43% worrying about it "a great deal" and 22% "a fair amount."
- There has been a 71% rise in online searches⁴ for sustainable goods globally, over the past five years.
- 90% of Gen Z consumers surveyed have bought a sustainable product⁵ in the past six months.
- 70% said they would change their shopping habits⁶ if they discovered that a store or brand wasn't operating sustainably.



What Companies Are Doing to Become More Sustainable

Today's CX leaders find themselves navigating the interplay between safeguarding the planet in the long run and immediate financial interests. Brands with sustainability top of mind are moving in different directions and at different speeds to implement changes from pledges and offsets to altering the products and packaging they manufacture.

Nearly all of the world's top 250 companies⁷ (G250) report on sustainability. New research from Boston Consulting Group (BCG)⁸ shows that more than 60% of companies consider environmental, social, and governance (ESG) factors a primary focus or a key criterion for selecting and prioritizing digital initiatives, and more than 80% plan to increase their investments in sustainability. ESG transcends mere intentions, encompassing a concrete, actionable strategy that yields tangible outcomes. True achievement extends beyond climate change, diversity, and disclosures; it necessitates ingraining these principles throughout every facet of your enterprise, spanning investment to sustainable innovation.

By uniting top talent and cutting-edge technology, CX leaders can gain enhanced insight and respond swiftly, empowering them to confront present-day's major hurdles and seize tomorrow's most promising opportunities.

Brands have a chance to not only share where they stand on sustainability but to drive real change. While no single organization can reverse the tide, the decisions leaders make can have a ripple effect across the global economy. A recent study by the [World Economic Forum](#)⁹ found that just eight supply chains account for 50% of all global carbon emissions.

As climate change intensifies, companies across industries are revolutionizing their strategies to create a sustainable future that benefits everyone. They're actively reducing emissions, minimizing consumption and waste, and protecting biodiversity. Supply chains are adapting, materials are changing, and travel is carefully evaluated. But here's the key: businesses can't do it alone.

How Employees View Sustainability

The role of values and purpose in attracting and retaining talent has become increasingly important when considering business priorities. As a growing number of employees consider a company's climate policies, organizations are increasingly putting sustainability front and center.

People care about sustainability and climate change, which influence not only their purchasing choices but their employment preferences. Along with a fair wage, employees seek employers whose values are consistent with their own. According to a 2021 [Gallup survey](#)¹⁰ of 1,010 U.S. adults, 43 percent express significant concern about global warming, with an additional 22 percent feeling moderately concerned. A small minority, 18 percent, and 17 percent respectively, have minimal or no worries about it.

Consumers across all generations – from Baby Boomers to Gen Z – are now willing to spend more for sustainable products.

Furthermore, companies that lack sustainable practices are less attractive to job seekers. In a 2021 survey conducted by [IBV](#),¹¹ 71 percent of 14,000 global adults seeking employment expressed a desire to work for environmentally sustainable companies.

Organizations of all sizes are embracing ESG goals, presenting a chance to harness employees' passion for the subject and drive tangible progress towards these objectives while pursuing

other business goals. Brands are taking the lead on engaging employees on environmental sustainability and strengthening their culture, talent retention, and employee satisfaction.



The Importance of CX in the Sustainability Movement

Customer experience has always been a critical aspect of business success. In the context of sustainability, CX plays an even more crucial role. Environmentally conscious consumers expect companies to demonstrate their commitment to sustainability throughout the entire customer journey.

Every touch point represents an opportunity to reinforce sustainable practices, from product sourcing and manufacturing processes to packaging, delivery, and post-purchase support.

Building Trust and Loyalty


Companies can cultivate trust and loyalty among environmentally conscious consumers by prioritizing sustainability in their CX strategies. Being transparent about sustainable practices, certifications, and the environmental impact of products fosters authenticity. This transparency is crucial in attracting and retaining environmentally conscious customers who often research a brand's sustainability efforts before purchasing.

Sustainable Product Offerings

To cater to environmentally conscious consumers effectively, brands can offer sustainable products or services. This involves using ethically sourced materials, minimizing waste, employing renewable energy sources, and reducing carbon emissions. Organizations can also explore product life cycle management, encouraging recycling, repurposing, or responsible disposal. These efforts not only meet consumer demands, but contribute to a circular economy.

Personalization and Education

Providing personalized experiences and education empowers consumers to make sustainable choices. CX strategies should incorporate features that allow customers to customize products based on their sustainability preferences. Additionally, companies can educate customers about the environmental impact of different choices, providing information on carbon footprints, eco-friendly alternatives, or the benefits of sustainable practices.



“Consumers will not only read ingredients, but also take note if packaging is non-recyclable.”

Innovation and Collaboration

Embracing sustainability necessitates innovation and collaboration within and between industries. Companies can reimagine their CX practices by actively seeking eco-friendly solutions and collaborating with suppliers, partners, and customers to drive sustainable initiatives. This collaborative approach fosters shared responsibility and demonstrates a genuine commitment to environmental stewardship.

Embracing Technology

Technology plays a vital role in reimagining CX for sustainability. Implementing smart systems to optimize energy usage and leveraging data analytics for supply chain optimization are just a few examples of how technology minimizes environmental impact. Companies can also utilize digital platforms and social media to communicate their sustainability efforts, engage with environmentally conscious consumers, and amplify their initiatives' impact.

Transforming from the Inside for the Outside

The emergence of eco-conscious consumers is transforming the business realm, demanding a fresh approach to CX strategies. Companies that prioritize sustainability in their CX efforts have a unique opportunity to earn the trust, loyalty, and support of this expanding market.

In today's world, both consumers and employees are urging corporations to play their role in combating climate change. Though achieving a fully sustainable future may appear daunting, companies can make a real impact by taking meaningful steps toward sustainability. It's not an all-or-nothing endeavor.

By embracing this challenge, forward-thinking companies stand to gain significant advantages, while paving the way for a better world for generations to come and meeting customer expectations. As environmental responsibility gains increasing significance, integrating sustainability into CX is becoming an essential factor for long-term success in the business landscape. 🌱



Links:

- 1 <https://ibm.co/sustainability-consumer-research>
- 2 <https://www.mckinsey.com/industries/paper-forest-products-and-packaging/our-insights/sustainability-in-packaging-inside-the-minds-of-us-consumers>
- 3 <https://news.gallup.com/poll/355427/americans-concerned-global-warming.aspx>
- 4 <http://www.businessnewsdaily.com/15087-consumers-want-sustainable-products.html>
- 5 <https://www.environmentalleader.com/2022/09/consumers-are-consistently-willing-to-pay-more-for-sustainable-products/>
- 6 <https://www.cleanlink.com/news/article/Survey-Do-Consumers-Value-Sustainability-Based-Products--28560>
- 7 <https://kpmg.com/xx/en/home/insights/2022/09/survey-of-sustainability-reporting-2022/global-trends.html>
- 8 [https://c212.net/c/link/?t=0&l=en&o=3489738-1&h=3480810264&u=https%3A%2F%2Fwww.bcg.com%2F&a=Boston+Consulting+Group+\(BCG\)](https://c212.net/c/link/?t=0&l=en&o=3489738-1&h=3480810264&u=https%3A%2F%2Fwww.bcg.com%2F&a=Boston+Consulting+Group+(BCG))
- 9 https://www3.weforum.org/docs/WEF_Net_Zero_Challenge_The_Supply_Chain_Opportunity_2021.pdf
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- 11 <https://thecsrjournal.in/ibm-employees-work-environmentally-sustainable-companies-pandemic/>

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– CX Leaders Trends & Insights Corporate Edition, March 2023

"Difficulty in Reaching a Live Person" was the top frustration among consumers."

– CX Leaders Trends & Insights Consumer Edition, October 2022



"Sixty-two percent of agents managed by survey respondents are in a Hybrid work environment, compared to 23% strictly working from home, and 11% strictly working in an office."

– CX Agents, March 2023

"Thirty-three percent of survey respondents have been asked for price increases by their BPOs in the past 12 months."

– CX Outsourcing Insights, June 2023



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Voice to Visualization: Powering Actionable Insights with Voice Analytics

Voice Analytics is the key to unlocking true customer-centricity.

By Frank Pettinato, CEO of Avantive Solutions

Organizations worldwide are in constant pursuit in the ever-evolving landscape of digital transformation and rapid technological advancements, and the utilization of voice analytics has emerged as a critical strategy for organizations striving to attain actionable insights. McKinsey & Company reports¹ that a mere 37% of organizations believe they are effectively leveraging analytics to produce customer value.

Going beyond the mere generation of data outputs, voice analytics possesses the capability to revolutionize operational efficiency, unlock the secret to elevated customer satisfaction, and provide unmatched personalized experiences. Every interaction holds significance, but by combining data, visualization, and humanization, it can become a driving force that creates meaningful experiences and provides the opportunity for unparalleled success.



Unveiling the Power of Voice Analytics

Voice analytics, in conjunction with additional metadata, offers businesses a powerful tool for understanding customer needs in specific areas. By identifying patterns and employing visualization and analytics, optimized scripts can be created that prepare employees for specific interactions, enabling them to better handle specific customer needs and achieve desired outcomes effectively.

Some of the emerging trends include understanding the power of specific words and phrases, and how they impact outcomes. Research conducted by [Jonah Berger](#) and [Grant Packard](#)² has highlighted the considerable influence of using concrete words which are tangible qualities or imaginable characteristics that we know through our senses. For example, saying “you’ll receive your money

back shortly” enhances the sense of tangibility and familiarity with customers versus the more abstract “you’ll receive your refund back shortly.”

The research’s comprehensive analysis of over 1,000 customer service interactions revealed a strong correlation between customer satisfaction and purchasing behavior when service employees employed concrete language during their interactions. Voice analytics allows businesses to identify linguistically concrete expressions that have the potential to profoundly impact customer perceptions. By incorporating visualization, businesses can use examples of these concrete words to train their call center agents or sales associates, further enhancing their effectiveness in achieving the desired outcomes.

In addition to linguistic analysis, leveraging paralinguistic metrics such as speech rate and word usage can be used to establish optimal agent-to-customer matching. By analyzing historic customer data and customer

profiles, contact centers can assign customers to specific agents who align with the customers’ individual communication preferences. The proactive approach of customer-to-agent matching ensures a personalized and engaging experience from the start, leading to enhanced customer satisfaction and positive brand perception.

The combination of voice analytics and getting information in near real-time through reporting and actionable insights empower organizations to make data-driven decisions instantly, reducing the time frame from days to minutes. This enables them to deliver an enhanced customer experience and achieve desired outcomes efficiently. By providing faster coaching and feedback based on comprehensive



37%

Only 37% of companies feel they're using advanced analytics to add value

Stat from McKinsey & Co.

69%

Enterprises that integrate AI with humans report a 69% improvement in agent satisfaction

Stat from Forrester

data and presenting it through easy-to-understand visualizations, organizations gain immediate insights into activities, quickly identify opportunities, and help them optimize operations and improve overall performance.

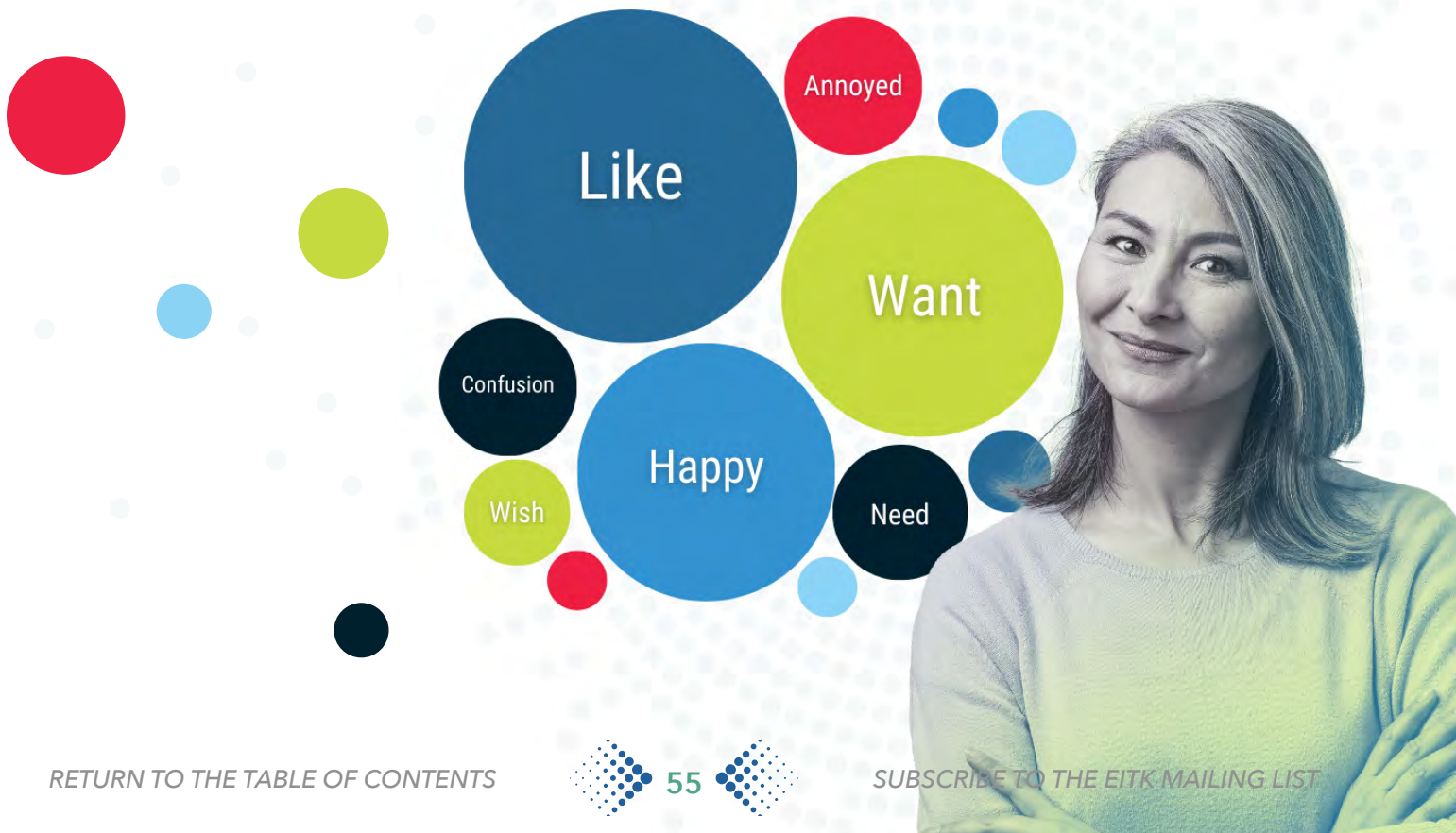
The Human Touch in Data-Driven Decision Making

Voice analytics plays a vital role in providing feedback that enhances performance and drives improvements within organizations. By monitoring 100% of calls, voice analytics ensures compliance with regulatory guidelines, client standards, and internal policies. Without utilizing this technology, some contact centers only randomly sample two to four calls per agent a month, leaving a huge gap in opportunities to improve and time to perform the review and provide feedback. Voice and speech analytics identify deviations from established protocols, enabling businesses to mitigate risks and maintain adherence to guidelines. This capability is particularly valuable in industries with strict compliance requirements, such as finance, healthcare, and telecommunications.

Avantive Solutions has found that providing feedback to agents across 100% of calls, rather than randomly monitored calls, helps secure more significant agent buy-in and creates a better learning atmosphere for getting new agents up to speed. In addition, it can decrease attrition rates during the first 120 days of tenure due to timely, accurate feedback and coaching.

One of the key advantages of voice analytics is its ability to differentiate between customer and agent speech, facilitating a comprehensive breakdown of conversations. Through meticulous exploration of the dynamics within these interactions, organizations can uncover valuable opportunities for improvement. Additionally, insights from voice analytics can inform agent training initiatives, pinpointing areas where additional coaching or development is needed so teams can fine-tune performance metrics, such as call handle time, resolution rates, and customer satisfaction scores.

To make feedback more engaging and interactive, organizations can incorporate gamification elements into the voice analytics



process. Users can receive points, progress indicators, or rewards based on their performance, creating a sense of motivation and achievement. Automated scorecards can be used to showcase top performers on leaderboards, fostering friendly competition and encouraging employees to strive for improvement. This gamified approach not only makes feedback more enjoyable but also drives continuous growth and learning within the workforce.

By using insights to identify and recognize top performers, organizations can tap into their expertise to support the growth and development of other agents. This collaborative environment promotes learning, mentorship, and career advancement opportunities, fostering a culture of excellence and driving overall team performance.

Furthermore, sentiment analysis enables assessment of the emotional tone exhibited by both agents and customers throughout their conversations. By segmenting sentiments at various stages of the interaction, organizations can gain a nuanced understanding of customer engagement and its impact on key performance indicators such as Net Promoter Scores (NPS). This deeper insight into customer emotions allows organizations to tailor their approaches, resolve issues more effectively, and create meaningful experiences that drive customer loyalty and advocacy.

The Fully Automated Future

According to Forrester, enterprises that integrate artificial intelligence with humans report a 69% improvement in agent satisfaction³. Automated scoring with speech analytics provides consistency and standardization by removing subjectiveness and human error while ensuring consistent reporting. Real-time monitoring is a core benefit in automated scoring systems because, within minutes of a call, it can provide an assessment of agent performance. This visibility empowers organizations to identify trends, pinpoint potential issues, and make data-driven decisions swiftly.

VOICE TO VISUALIZATION: ANALYTICS ACROSS INDUSTRIES

Ecommerce brands can create and analyze call transcriptions to identify patterns in reasons for product returns and take steps to improve product quality.

Fast food restaurants can identify patterns and preferences for drive-thru customers such as items frequently ordered together so employees can suggest complementary options, increasing the chances of upselling and cross-selling.

Voice analytics in **healthcare** can help providers assess cognitive status and detect early signs of neurological issues by analyzing speech and language patterns. This approach enables early intervention and improves patient outcomes.

Hotel chains can use natural language processing to extract sentiment and get an overall understanding of guest perceptions about the new amenity.

Automated scorecards also offer agility in adapting to changing requirements. This flexibility ensures that contact centers align with updated guidelines, allowing them to maintain compliance and deliver high-quality service without disrupting operations.

As voice analytics continues to evolve and seamlessly integrate with artificial intelligence (AI), machine learning, and Natural Language Processing (NLP) technologies, organizations across industries will unlock the power of a self-learning ecosystem. By embracing the fully automated future of voice analytics, they can stay at the forefront of innovation, drive efficiency, and deliver exceptional results.

Looking at the healthcare industry as an example, the future of voice analytics holds immense potential. By incorporating advanced technologies such as NLP, voice analytics can revolutionize patient care and support healthcare professionals. Through automated transcription and analysis of doctor-patient interactions, voice analytics can extract vital medical information, identify potential issues or risks, and provide actionable insights to healthcare providers. For instance, during a medication adherence call, when reaching out to a patient with lapsed prescription, analyzing the calls can help identify root causes and reasons. Visualizations, such as interactive charts and graphs, complement these automated insights, offering healthcare professionals a comprehensive and holistic view of patient data. This enables them to make informed decisions, deliver personalized care, and drive improved patient outcomes.

Voice Analytics is the key to unlocking true customer-centricity. By combining data-driven personalization, comprehensive visualization, and continuous optimization, organizations can create exceptional and deeply human experiences. As we look to the fully automated future, Voice Analytics will integrate with advanced technologies, revolutionizing industries and paving the way for personalized care, operational optimization, and unparalleled customer satisfaction.

An example of a future state is capturing and analyzing audio data, in combination with meta data such as a license plate at a fast-food drive-thru window. By analyzing customer interactions at the drive-thru window, voice analytics can identify patterns and preferences. If customers frequently order specific items together, the system can notify employees to suggest complementary or upgraded options, increasing the chances of upselling and cross-selling. This data can be used to train AI drive-thru attendants, which will further enhance the customers' experience while providing consistent and repeatable upsell cross-sell opportunities for the brand.

The future of voice analytics holds immense potential when combined with advanced technologies like facial recognition. The integration of voice analytics and facial recognition will allow businesses to gather additional context and cues from customer interactions. By analyzing not only spoken words but also facial expressions, emotions, and gestures, organizations can gain a deeper understanding of customer experiences and intentions. This approach will create highly personalized experiences, optimize operations, and drive success in the digital era.



Frank Pettinato
CEO

Frank Pettinato is an accomplished thought leader with expertise in strategic leadership, sales and marketing, innovation, and technology. Currently, he is the CEO of Avantive Solutions, a global provider of digital marketing and business process outsourcing (BPO) solutions, where he uses his passion for Purpose-Driven culture and results-oriented style to delight clients, engage and develop his employees, and support the community.



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- 1 <https://www.mckinsey.com/capabilities/operations/our-insights/how-advanced-analytics-can-help-contact-centers-put-the-customer-first>
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Understanding the Customer Experience Journey: A Comprehensive Overview

How does the AI-powered CX journey of the modern age revolutionize the customer engagement process?

By Brian Trampler, Senior Strategy Manager at Black Box

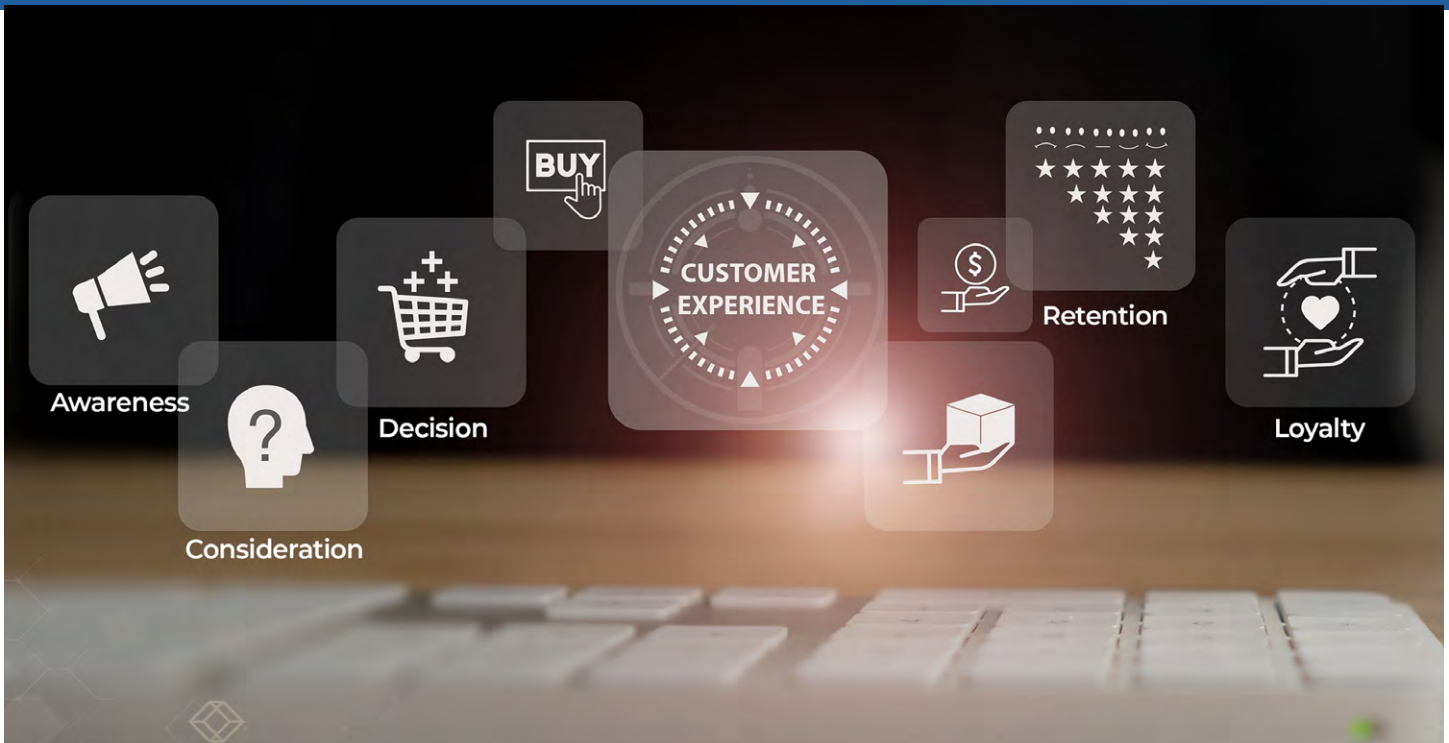
Customer experience (CX) has emerged as a crucial differentiator for organizations across industries in the fast-paced, hyperconnected world of today. Technology improvements and shifting customer expectations have spurred a remarkable transformation in the CX journey. Right now, the utilization of artificial intelligence (AI) to enhance and customize customer experience (CX) stands out as a significant milestone in the ongoing transformation of the CX journey.

However, many businesses lack the essential plans and expertise to fully leverage AI and bridge the capacity gaps. It is important for leaders to assess their company's readiness for change and seek the right guidance to achieve their objectives. In this article, we will discuss the milestones of the customer experience journey and how the AI-powered CX journey of the modern age can revolutionize the customer engagement process.

What You Need to Know About the CX Journey

The CX journey is a crucial idea in contemporary business that focuses on comprehending and maximizing interactions between customers and enterprises. It includes every interaction and touch point a customer has gone through, from the first point of contact through interactions after purchase, to provide a seamless and positive experience at every stage.

The customer journey is not a straight line; instead, it is a collection of connected stages that customers move through in accordance with their needs, preferences, and objectives. Awareness, consideration, decision, retention, and loyalty/advocacy are examples of these stages.



Let's delve deeper into each phase:

Awareness

The stage of awareness is when a customer first learns that a brand or a product exists. It is usually started while looking for a solution to a problem the consumer has. There are many ways for it to happen, including advertising, word-of-mouth, and web research.

The goal in this phase is to be seen, so online visibility via as many forms as possible – including optimizing your website for SEO – is important. Blog posts, social media posts, and demonstrating knowledge leadership in your industry helps you show up.

Consideration

Once informed, the customer begins to explore the company or product as a potential remedy for their challenges or requirements. To make an informed decision, they can weigh several possibilities, read reviews, and gather data. Differentiation is key in this phase – what sets you apart from your competition needs to be part of the message.

Decision

The customer makes a decision to buy at this point and completes the transaction. The transaction should happen as seamlessly as possible. Any friction in this stage will rapidly turn customers away, so it is important to have use cases, case studies, or even online reviews available at this phase in the customer journey.

Retention

Did you know that a 5% increase in customer retention can lead to as much as a 25% increase in company profit? This demonstrates that your interactions matter well after the initial sale. Customer service interactions, problem-solving, customer surveys, and new services are all part of this stage. It is important to follow up and take action on any feedback you are given.

Loyalty

At this phase, your customer becomes a voice of your brand and helps to expand it to new customers. This is all about creating a community that continues to talk about your brand. The feedback that you gathered earlier is its own voice, so it is important to respond to any feedback in a positive and timely manner. Adding incentives, rewards, and referral benefits can help to create that loyalty to your brand.

The Evolution of the CX Journey

The evolution of the CX journey over time has been largely influenced by changes in technology, consumer behavior, and the business environment.

Let's examine the prime features of its development:

Conventional Offline Experience

In the past, conventional offline channels including brick-and-mortar storefronts, print marketing, and in-person encounters were the main ways that the customer journey was carried out. Customers relied on sparse information sources, and their contacts with enterprises were frequently limited to particular places and operating times.

Rise of Online Interactions

As e-commerce and the Internet took off, online interactions began to take a more prominent place in the CX journey. Customers now have the convenience of shopping from the comfort of their homes after doing product research and price comparisons.

Multichannel and Omnichannel Experiences

As technology developed, companies started to realize how crucial it was to deliver a consistent user experience across many channels. To

seamlessly combine online and offline touch points, the concepts of multichannel and, later, omnichannel experiences developed. Whether a customer interacted with a business through a website, mobile app, social media, or in-store, they anticipated a consistent experience.

Personalization and Data-Driven Insights

Businesses began utilizing personalization strategies to improve the customer journey as a result of the wealth of consumer data made available through digital interactions. They made use of client data to deliver relevant product recommendations, target marketing messages, and personalize experiences according to user preferences. Understanding consumer behavior and improving the CX journey now require the use of data analytics and customer relationship management (CRM) solutions.

Mobile-First and Mobile-Only Experiences

As smartphones and other mobile devices proliferated, these concepts gained popularity. Customers increasingly used mobile apps and websites that were mobile-friendly to do product research, make purchases, and communicate with businesses. Throughout the customer journey, the mobile channel has grown to be an essential touch point, mandating responsive design and frictionless mobile experiences.

Voice Assistants and Chatbots

The development of voice assistants like Siri, Alexa, and Google Assistant as well as breakthroughs in AI and natural language processing opened new possibilities for customer interactions. With voice search, voice commands, and chatbot-based customer assistance, the CX journey has become more convenient, and information can be accessed more quickly.





Integration of Augmented Reality (AR) and Virtual Reality (VR)

In particular sectors like retail and tourism, AR and VR technologies have started to impact the consumer experience journey. Through immersive experiences, customers can virtually try on items, picture furniture in their homes, or explore trip locations. These innovations improve the pre-purchase analysis phase and enable buyers to make more educated choices.

Customer Journey Mapping and Design Thinking

Businesses have embraced customer journey mapping and design thinking approaches to understand the CX journey more thoroughly. Companies started pinpointing areas for development and innovation by mapping out the customer's interactions, emotions, and pain points at each stage.

Agent journey mapping is an area that is often overlooked when considering the CX journey. But removing barriers to success for your agents is crucial if you want to provide superior customer service. By using agent journey mapping, businesses can create a better agent experience by freeing up an agent's mental and emotional energies to engage with the employee on a human level. This translates into a better employee experience, which in turn leads to a better CX.

Emphasis on Customer Delight and Emotional Involvement

In recent years, there has been a movement toward providing memorable experiences and emotional involvement. Businesses understand that the attitudes and loyalty of their customers are greatly influenced by their emotions. Delivering individualized, genuine, and pleasurable experiences that go above and beyond fulfilling functional demands is the focus of efforts to forge a deep emotional bond with clients.

Integration of AI and Automation

The CX journey is hugely influenced by AI and automation technologies. Businesses can now offer real-time support, individualized recommendations, and proactive customer service, thanks to chatbots, AI-powered recommendation engines, and predictive analytics. Processes are streamlined, response times are decreased, and efficiency is increased through automation, which enhances the overall CX. AI can even be utilized to streamline call wrap-up for agents and provide consistent feedback and training recommendations, further enhancing the agent journey.

The Changing CX Landscape: Is AI the Future?

Over the past 10 years, the CX landscape has undergone a profound transformation. The time when only call centers and conventional brick-and-mortar retailers could communicate with customers is long gone. Customers now expect personalized, frictionless, and convenient experiences throughout their journey, thanks to this transformation that has empowered them.

Businesses have realized they must use technology to satisfy these changing customer expectations. In today's aspect, AI has proven to be a game-changer. Personalization, sentiment analysis, predictive analytics, chatbots, and other AI-powered customer insights and CX tools have completely changed how companies connect with their customers.

Concluding Thoughts

In conclusion, the AI-based CX journey enables companies to give customers individualized, effective, and proactive experiences. Organizations are now able to obtain important insights, automate repetitive operations, personalize interactions, anticipate customer demands, and provide seamless experiences across channels by utilizing AI technologies throughout the CX life cycle.

AI and the future of CX require a fresh perspective and a well-designed framework. By integrating back-end CRM, enhancing commerce, personalizing experiences, and introducing new touch points, we can predict behaviors, trends, and expectations. To ensure successful AI implementations, we need to adopt a new blueprint that prioritizes customer intent, preferences, and behaviors.

It's important to recognize that customer engagement is not a cost center, but rather an investment in building strong customer relationships. With imagination and ingenuity, AI has the potential to not only enhance CX but also improve every aspect of our business.



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Brian has been in the collaboration and communications space for over 25 years. He's held positions as a global help desk manager, technical sales engineer, technical account manager, and senior product manager with video-centric applications, contact center and customer experience, collaboration, and A/V experience.



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