BRAND SPOTLIGHT
Microsoft

Carlos Castano is a seasoned customer success leader boasting over two decades of expertise in driving transformative outcomes. With a rich background marked by a relentless pursuit of excellence, he has consistently empowered global teams to push beyond limits and achieve their fullest potential. Throughout his career, Carlos has been a beacon of inspiration, fostering talent development and steering teams toward success. His leadership approach can be summed up by three fundamental principles: a steadfast emphasis on Progress, an unwavering commitment to Stay Positive in all endeavors, and a resolute dedication to Always Do the Right Thing, championing the well-being of people, customers, and the business alike.

In this interview, Carlos shares his transition from Cisco to Microsoft, driven by Microsoft's customer-centric ethos, inclusive culture, and commitment to delivering exceptional experiences. He underscores the pivotal link between employee experience and superior customer service, advocating for reducing friction, empowering employees, and fostering engagement within the workforce. Additionally, he highlights Microsoft's consultative approach to customer success, focusing on tailored solutions and collaborative execution to achieve customer objectives.

CARLOS CASTANO

Sr. Director, Customer Experience & Success

As for my current role, I have the privilege of leading our Business Excellence & Experience (BE&E) team within CE&S Business Operations & Programs. In this role, my team and I are entrusted with shaping the strategy and execution of analytics solutions, continuous improvement initiatives, and customer experience programs. We aim to empower our support professionals, enabling them to deliver their best work and consistently provide exceptional customer experiences.

Execs In The Know (EITK): Please share a little about your background and how you came to be at Microsoft, and describe the day-to-day focus of your current role regarding customer experience.

Carlos Castano: In 2021, I transitioned from a 20-year tenure at Cisco to join Microsoft's Customer Experience & Success (CE&S) organization. This decision was shaped by three key factors that deeply resonated with me:

Firstly, during my previous role in High Touch Services, I had the privilege of Microsoft being one of my customers. Later, as the leader of Cisco IT's global end-user computing and employee support experience, I closely collaborated with Microsoft as one of our strategic suppliers. In both experiences, I was genuinely impressed by Microsoft's customer focus, integrity, and eagerness to establish strong partnerships.

Secondly, I was inspired by Microsoft's inclusive, customer-focused, and growth mindset culture. After conversing with various Microsoft colleagues, it became clear that this was a company I wanted to be a part of.

Lastly, I found myself inspired by Microsoft's CE&S charter, responsible for the strategy, design, and implementation of the Microsoft end-to-end customer experience. This charter reflects our collective ambition to delight customers and exceed their expectations in every interaction.

EITK: What are some of the most important experiences and insights you've gained throughout your career, and how are they shaping your work for Microsoft?

Carlos: Here are three experiences that come to mind that have shaped me as a Customer Experience (CX) leader:

Great CX Starts with Employee Experience (EX). I firmly believe that creating great customer experiences begins with employee experience. Here at Microsoft, one of our key leadership principles is "People First: We take care of our people, so our people can take care of our customers." Additionally, when thinking EX, I like to approach it in three dimensions:

1. **Reducing Friction/Effort:** Our goal is to make things as easy as possible for our employees to enable them to excel in their roles. We continuously work on eliminating friction from our processes, systems, and tools.

2. **Trust and Empowering Our People:** Empowered employees are more likely to be engaged and contribute to creating exceptional experiences. Plus, it's the right thing to do.

3. **Fostering Employee Engagement:** Engagement promotes passion, commitment, and productivity. Engaged employees genuinely care about their work and their impact on the company's success.

Walk in Your Customer's Shoes. To truly understand and improve the customer experience, putting ourselves in our customers' shoes is crucial. This seemingly simple practice can yield transformational insights. For instance, when was the last time you personally opened a case with your support team to experience the process or spent a day reviewing customer survey feedback verbatims? I guarantee that you will get multiple great improvement ideas when you do. This approach is particularly important in larger corporations where many team members primarily interact with internal colleagues. A guiding principle to stay customer-focused is to consider "Our most important customer as the next person downstream in our value chain."

Cultivate a Culture of Continuous Improvement. Operational excellence doesn't mean achieving perfection but maintaining discipline, focus, and passion for continuous improvement, always with the customer at the forefront. I once had a leader who instilled in me the importance of persistently addressing problems at their root. Looking back, this has been one of the most valuable lessons in my career. In today's world of services and support, it's easy to move on once a situation is mitigated. However, truly delving into rootcauses demands discipline. Neglecting this can lead to issues resurfacing in different regions or with different clients.

EITK: Company policies and processes play a major role in shaping the customer experience. How has Microsoft evolved these aspects of its business, and how have they impacted things like resolution rate, customer satisfaction, and customer effort?

Carlos: First and foremost, our policies and processes are grounded in our privacy commitments to ensure our customers' and employees' privacy and their data are always safe.

Furthermore, we continuously evolve our processes, objectives, and measurements, focusing on simplification and adaptability to deliver exceptional customer outcomes. Experience shows us that with the customer in mind, well-designed efficiency improvements will lead to improved customer experiences (e.g., lower effort, improved resolution effectiveness, improved satisfaction and sentiment).

EITK: How would you describe Microsoft's culture, values, and overall mission in serving its customers?

Carlos: At Microsoft, our "big why" and mission is to empower every person and every organization on the planet to achieve more. Achieving our mission requires us to embrace and commit to our culture, which is our "how." It all starts with adopting a growth mindset – a passion to learn and bring our best every day to make a bigger difference in the world. It's about curiosity, seeking feedback, and learning from mistakes. Supporting our "growth mindset" culture, we embrace three key attributes:

- **Customer-obsessed:** We prioritize understanding our customers' perspectives and listening with empathy to advocate for their needs.
- **Diverse and inclusive:** We value diversity and inclusion, actively seeking out and embracing differences in backgrounds, experiences, and perspectives.
- **One Microsoft:** We emphasize working together, focusing on what's best for the team.

Finally, our core values, including respect, integrity, and accountability, guide how we interact and sustain our culture.

EITK: What does a common customer success engagement look like for the brand?

Carlos: Our customers' success is at the core of who we are. We exist because of our customers and are driven by a clear principle: to help them realize the full potential value of their Microsoft investments.

Our preferred approach follows a consultative model that ensures our technology serves our customers' business outcomes.

Our customer success journey begins with attentive listening to understand our customers' needs and objectives. Subsequently, we focus on designing the right solutions to help realize these outcomes. To operationalize this approach, we collaborate closely with our customers to establish a Customer Success Plan (CSP). And, with our Microsoft Unified service, we mobilize our talent to seamlessly bridge the CSP with delivery execution, thereby expediting the realization of value.

To close the loop, we advance to the manage and optimize phase, where we concentrate on ensuring the ongoing health of the solution and driving continuous improvement through our Microsoft Unified proactive and reactive services.

EITK: For many organizations, the past year has been filled with challenges and many big and small wins. Looking back over the past year so far, which success has meant the most to you?

Carlos: Reflecting on the past year, I am proud of our strides in harnessing AI technology to drive real-world impact. While AI has been a topic of discussion for years in our industry, I believe that we have now reached an inflection point where AI's promises are becoming a reality.

In Microsoft's Customer Service & Support Team, which serves over a billion customers globally, we have successfully enabled Microsoft Copilot in our Dynamics 365 Customer Service environment. The Copilot AI capabilities, powered by large language models, are proving to be a game-changer in enhancing the productivity of our support agents and engineers, leading to faster and superior customer experiences.

Here are a couple of examples:

- **Case Summarization:** Our engineers can use Copilot to generate concise case summaries rather than sift through extensive case histories to understand an issue. This enables them to rapidly grasp the situation and formulate effective problem-solving strategies.
- **Knowledge-Base Effectiveness:** Customer support often involves navigating through multiple knowledge bases, articles, and case histories to identify relevant solutions. Copilot has proven invaluable by synthesizing vast amounts of information from various systems, enabling our engineers to quickly access pertinent articles that have helped resolve similar issues.

In short, AI is enabling our engineers to focus on what they do best, helping customers resolve complex issues while Copilot streamlines tasks, saving them valuable time in the process.

EITK: Which CX trend or technology are you most intrigued by diving into 2024, and what should every CX leader be tracking?

Carlos: AI is undoubtedly becoming a game-changer in our industry, and I foresee significant developments in the coming year. The barriers to AI adoption will be lower, making AI capabilities more prevalent across the products we use and procure.

In our customer support field, I anticipate that most of the advances in the next year will be geared toward enhancing productivity and new data and AI job creation. Companies that embrace AI and seize this opportunity will likely gain a substantial competitive edge over their peers.

EITK: Can you share how your involvement in the EITK community, including Know It All "KIA," translates into value for yourself, your organization, and the CX community at large?

Carlos: Continuous learning from diverse industry experts has been incredibly valuable to me. Whenever I engage in EITK forums, I gain fresh insights and ideas from peers with diverse backgrounds and experiences. Equally rewarding is knowing that my insights have positively impacted colleagues as they navigate their journey to enhance their CX/EX strategies and contribute positively to their workplaces.

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 Carlos Castano and the entire team at Microsoft for contributing to the Execs In The Know Brand Spotlight.

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

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