



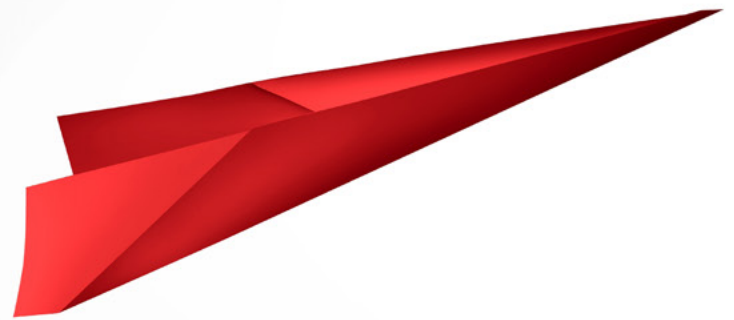
OCTOBER 2024 | QUARTER 4

CX Insight

AN EXECS IN THE KNOW PUBLICATION

The Next Era of CX

How people, technology, and data are shaping tomorrow's customer journeys.



**Future-Focused: Key CX
Trends for 2025**

**Agent-Facing AI: Strategic
Deployment In CX Operations**

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CX Insight

AN EXECS IN THE KNOW PUBLICATION

CX Insight Magazine
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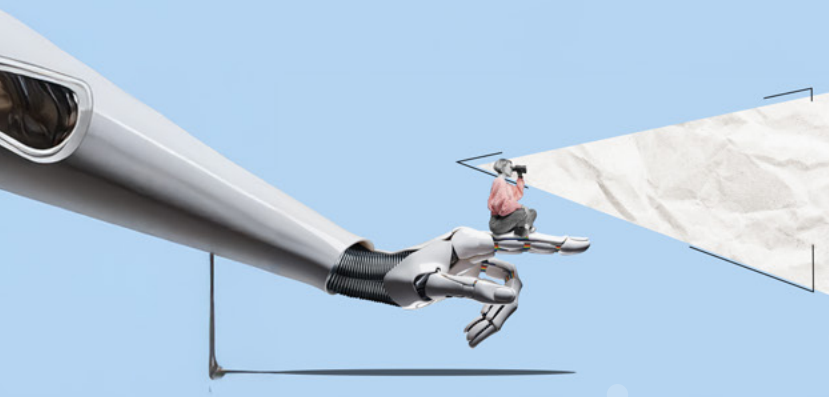
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Welcome

to the October 2024 issue of *CX Insight* magazine, an Execs In The Know Publication.

Embracing the Future of CX with Technology and Humanity

Welcome to the Q4 issue of *CX Insight* magazine, where we're diving deep into the future of customer experience (CX) as we close out 2024 and look ahead to what's next. This edition is packed with forward-thinking articles designed to inspire and equip leaders like you as you navigate the ever-evolving CX landscape.

As we prepare for 2025, one key theme rings loud and clear: the balance between technology and humanity. In *Future-Focused: Key CX Trends for 2025*, you'll explore how AI is transforming customer service and why emotional intelligence remains the irreplaceable edge for CX teams. AI is powerful, but it's the human touch that builds lasting connections.

Our AI feature, *Agent-Facing AI: Strategic Deployment in CX Operations*, discusses the strategic deployment of agent-facing AI in customer experience (CX) operations, highlighting how organizations are leveraging AI to enhance efficiency, reduce risk, and build a foundation for future customer-facing AI applications.

Metrics That Matter: KPIs for BPO Success takes a hard look at how businesses can hold their BPO partners accountable. It's not just about speed and cost; it's about loyalty, customer effort, and outcomes that make a real difference.

Our spotlight features are particularly exciting this quarter. John Caldwell of Target shares how leading with a people-first philosophy keeps its teams empowered and customers happy, while Shannon Burch of Neo Financial discusses how innovation and customer-centricity are reshaping the banking experience.

As always, we hope you'll find something in this issue that enlightens your perspective and sparks new ideas and innovation.

Let's finish the year strong – together.

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

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Break The Stigma



CREATING A POSITIVE IMPACT IN OUR WORLD

Our community has always been one that cares deeply – not only for the advancement of our industry but also for each other and the important issues that face our wider world.

Execs In The Know's Leading with Impact program goes beyond the boardroom with the goal of projecting time, resources, and attention to the issues that matter most to our community members, as well as their friends, family, and colleagues.

As part of our Leading with Impact initiative, we are partnering with NAMI (National Alliance on Mental Illness) and focusing on mental health awareness to help remove the stigma so often associated it. We're challenging our CX community to take a stance and become a stigma-free leader, co-worker, friend, and family member.

TAKE THE PLEDGE TO BE ~~stigma~~*free* TODAY!





Future-Focused: Key CX Trends for 2025

Explore trends like AI-driven contact centers, emotional intelligence, and the evolving role of data.

by Execs In The Know

Customer experience (CX) has always been a fluid and evolving landscape. As we prepare for 2025, CX leaders face challenges and opportunities that demand strategic, innovative thinking. Navigating the complexities of customer journeys, artificial intelligence (AI), agent experience, and personalization isn't just a matter of staying current – it's about leading the charge into a future where customer expectations are higher than ever.

This article examines three trends shaping CX for 2025, exploring the tools, strategies, and mindsets that will define success in the year ahead.

“ AT ITS CORE, DATA STORYTELLING IS ABOUT MAKING CONNECTIONS. ”

Retooling the Agent

The contact center agent's role has evolved dramatically, driven by the rapid adoption of AI technologies. In the past, agents managed repetitive, straightforward tasks – simple questions with scripted answers. But today, AI handles many of these routine interactions. This shift has left agents responsible for more complex, emotionally charged scenarios requiring advanced problem-solving skills and empathy. As a result, the agent's role has been redefined, calling for a new mindset in recruitment, training, and development.

Tackling Bigger, Tougher Problems

As AI takes on the simpler tasks, your agents are now expected to address intricate and often sensitive customer issues. These interactions demand far more than what any machine can handle. They require a blend of critical thinking and [emotional intelligence \(EQ\)](#)¹ – skills that are essential when navigating high-stakes disputes and conversations with no clear solutions. Agents are no longer just following scripts; they are engaging with customers on a human level, providing insights and empathy that build trust and satisfaction.

Tracy Sedlak, Senior Vice President of Customer Success at Offerpad, highlights this shift: “EQ is going to become the differentiator between humans and AI. How do we keep that alive and elevate it in our world? It’s going to be one of the only things we can differentiate between AI and human agents.” In essence, your agents are expected to do what AI cannot – connect emotionally with customers and solve problems with empathy and understanding.

EQ as a Core Skill

Emotional intelligence has emerged as the agent's most critical asset. Customers remember how your brand made them feel, and it's EQ that enables agents to navigate



emotional conversations with finesse. This skill isn't just about resolving issues – it's about valuing the customer and responding to their emotional state in a way that fosters loyalty.

Carolyn Truelove, Vice President of Reservations and Service Recovery at American Airlines, emphasizes the importance of EQ in training: “It’s how we train EQ in the beginning. One of the biggest challenges with AI is implementing it without thinking about your business and the customers on the other end. It’s critical to leverage customer-facing AI as a tool to learn from the best of your human agents.”

Leading organizations are rethinking how they equip their teams, ensuring agents are not only technically efficient, but emotionally adept. By cultivating EQ, your agents can turn moments of frustration into loyalty-building opportunities – creating customer experiences that are personal, memorable, and human in ways that AI alone cannot achieve.

EMOTIONAL INTELLIGENCE HAS EMERGED AS THE AGENT'S MOST CRITICAL ASSET.

Ebrahim Hyder, Vice President of Customer Service at Michael Kors, explains, "It's about connection. Everyone has a role to play in elevating EQ in the customer space. It's not just what we say, but how we say it." He emphasizes the importance of [calibration calls](#)², asking, "Did the customer feel like we helped them?" This approach highlights the growing importance of EQ in the customer-agent relationship and reinforces the notion that contact center work is about more than just solving problems – it's about building connections.

As EQ becomes more critical, it is reshaping how we view and structure the roles within the contact center.

A New Approach

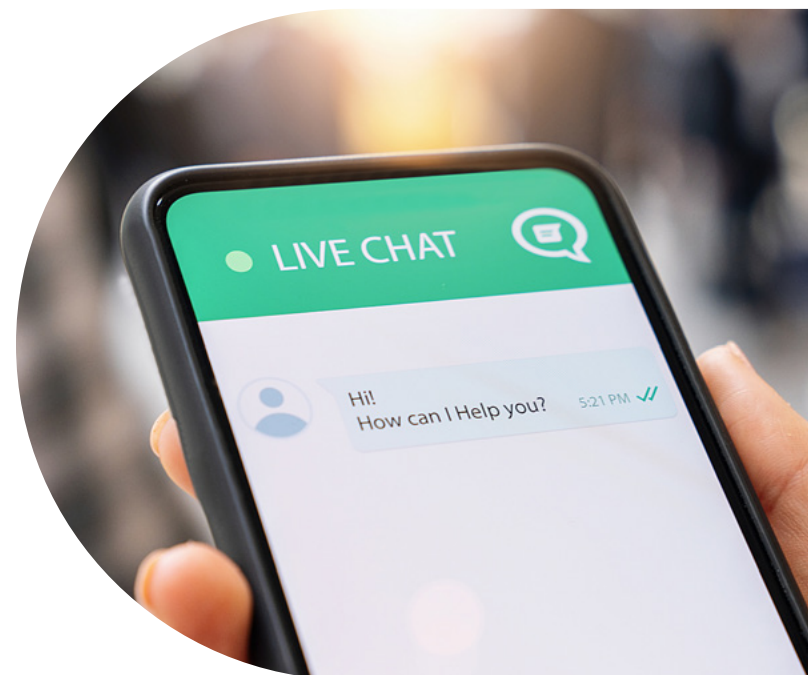
The shift in the agent's role has led to a reimagining of how companies approach hiring, compensation, and recruitment in the contact center. Traditionally, contact centers were seen as a temporary stop on a career journey, often characterized by high turnover and low wages. However, as the agent's role becomes more complex and valuable, companies are rebranding the contact center as a career destination with long-term growth opportunities.

A significant part of this transformation involves rebranding the contact center industry itself. Once viewed as a cost center or a temporary gig, the contact center is positioned as a place where individuals can [build fulfilling, long-term careers](#).³ Companies are highlighting success stories of agents who have risen through the ranks, using their experience in the contact center to move into leadership roles.

By promoting these narratives, companies are working to change the perception of contact center jobs. In the contact center, people can develop valuable skills like conflict resolution, communication, and problem-solving that are highly transferable to other business areas.

Hiring Differently

In response to evolving roles, companies are rethinking their hiring practices. Instead of emphasizing speed and efficiency, they prioritize candidates with strong problem-solving abilities, emotional intelligence, and adaptability. AI-driven tools are being integrated into the recruitment process to simulate real-world scenarios, offering a glimpse into how candidates handle emotionally charged situations.





Moreover, recruiters are broadening their search beyond traditional talent pools. Many seek individuals from backgrounds like counseling, social work, and customer service – where emotional intelligence and interpersonal skills are crucial. Managing stress, communicating effectively, and maintaining composure under pressure is becoming a cornerstone for success in these new roles.

Compensation and Career Growth

With the rising demand for emotionally intelligent talent, companies are evolving their compensation structures to attract and retain top performers. Contact center roles, once seen as low-wage stepping stones, have transformed into pivotal positions that fuel business growth. Beyond competitive pay, companies are embedding performance-based bonuses and incentives to draw in high-caliber professionals with the emotional intelligence necessary to navigate complex customer interactions and elevate the brand experience.

Career development is equally crucial. Companies are investing in specialized training

and leadership development programs, recognizing that emotionally intelligent agents often have the potential to grow into strategic roles. This shift is reshaping the perception of the contact center agent – from a temporary, transactional role into a critical career path that drives customer loyalty and business outcomes.

To further solidify these roles as career opportunities, organizations are pairing financial rewards with holistic benefits such as wellness programs, mental health support, and flexible working arrangements. These initiatives prevent burnout and foster a culture of engagement and retention, ensuring that the most emotionally intelligent and capable employees rise into leadership positions, ultimately contributing to long-term business growth.

Career Development and Learning Opportunities

Leading organizations are heavily investing in their agents' long-term development, offering clear pathways for advancement through specialized certifications and leadership opportunities. This investment shifts the

perception of contact center work from a dead-end job to a gateway for a rewarding career in customer experience and other business functions.

Agents who cultivate strong emotional intelligence and problem-solving skills are increasingly positioned for leadership roles, not only within customer experience, but in operations and broader strategic decision-making across the organization.

The Future of the Contact Center Agent

As we look ahead to 2025, the role of the contact center agent is more critical than ever. These agents are no longer just answering questions, they're solving complex problems, building emotional connections, and playing a key role in fostering customer loyalty. How we hire, train, and compensate agents is evolving to reflect the increased importance of their role in delivering exceptional customer experiences.

By retooling the agent's role and prioritizing emotional intelligence, companies are transforming the contact center into a place where careers can thrive. This shift will improve customer outcomes and elevate the perception of the contact center as a desirable and meaningful workplace. The future of CX belongs to those who can balance the power of AI with the irreplaceable human touch, and the modern contact center agent is at the heart of that transformation. But as these agents evolve, so must the experiences they help create – ones that are efficient and seamless.

The Push for Seamless Customer Journeys

Customers today don't just hope for seamless experiences, they expect them. Their patience is limited, and every glitch, delay, or disjointed interaction feels like friction they're not willing to tolerate. As we look ahead, CX leaders must



make the discovery and elimination of these friction points and unnecessary customer effort⁴ their top priority. It's no longer enough to meet expectations; we need to exceed them. In fact, some companies are going all in, creating teams dedicated to identifying every bump in the customer journey, with the ultimate goal of smoothing it all out.

But, let's take a step back. What does it mean to offer a truly frictionless experience? It starts with a mindset shift, from thinking like an internal agent trying to solve problems to thinking like a consumer trying to have an effortless experience.



Building a Culture of Simplicity

At its core, frictionless experiences begin with simplicity. And simplicity isn't accidental, it's cultural. The brands getting this right are the ones creating a culture where employees at all levels are empowered to ask the hard questions: What frustrates our customers? Where are we adding unnecessary complexity? What can we eliminate to make things easier?

This customer-first mentality is how the most successful companies are transforming their CX. They're not just improving it, they're simplifying it. They've moved beyond reactive support, taking a proactive stance, using data to anticipate issues and resolve them before customers even know they exist. Whether through easy-to-navigate self-service options, intuitive digital interfaces or real-time support that feels human, these brands have embraced simplicity as a core principle of their CX strategy. And that's where the real magic happens – when frictionless becomes the expectation, not the exception.

Personalization Without the Pressure

Let's face it: today's customers want personalization without feeling like they're being stalked. They expect brands to know who they are and anticipate their needs, but there's a fine line between thoughtful personalization and overstepping. The trick? Seamlessly integrating the correct data to deliver a tailored experience that feels helpful.

This is where AI shines. With AI, you're not just automating; you're creating personalized experiences that scale – without losing that essential human touch. The best brands know how to balance both. They're using AI to analyze patterns, anticipate needs, and recommend next steps, but they're also ensuring customers feel heard and understood on a personal level. Personalization, after all, is about relevance, not just automation.

The Power of a Unified Customer Record

Here's the reality: customer journeys are more fragmented than ever, and this fragmentation leads to frustrating gaps. Customers are tired of repeating themselves across different channels, from call centers to chatbots to in-store interactions. The solution? A unified customer record – a single, real-time view of every interaction a customer has with your brand, no matter where or how it happens.

It sounds simple, but it's not. It requires tearing down silos, centralizing data, and ensuring that your teams are aligned across the board. And here's the key: it's not just about collecting data; it's about knowing which data matters. The real opportunity comes from using that data in intelligent, actionable ways to deliver the kind of seamless experience your customers crave. Those who figure this out will not only deliver a cohesive, connected journey, but build trust and loyalty in ways that fragmented competitors can't touch.

Crawl, Walk, Then Run with AI

AI is opening doors for customer experience, but here's where many brands stumble: they try to sprint before they've mastered the basics. AI isn't a quick fix; it's a tool that must be thoughtfully integrated into your strategy. A smart approach starts with crawling – getting foundational systems in place, ensuring data accuracy, and establishing clear objectives. Only then do you start to walk, leveraging AI for insights and efficiency. When you're ready, you can run – delivering AI-driven experiences that feel intuitive and personal, not robotic or forced.

One last point to remember: customer issues aren't just problems to solve. They're opportunities to learn, iterate, and improve. By seeing these challenges through the eyes of your customers, you can shift from a reactive mindset to a proactive one, anticipating needs and turning potential frustrations into seamless moments of delight.



The future of CX lies in creating frictionless, personalized, and genuinely human experiences. It's about reimagining what customer experiences could be. When brands think like their customers, eliminate unnecessary friction, and leverage AI without losing sight of the human element, they unlock new opportunities for connection and growth. The challenge is real, but the opportunity is even greater. The brands that get it right will set the standard for what seamless experiences should be – and their customers will thank them for it.

But creating frictionless journeys and personalizing interactions is only part of the equation. To take your CX to the next level, you need more than data – you need to tell a story with it. The next step in your journey is learning how to harness the power of CX data storytelling, where insights come alive and drive meaningful action. Let's dive into how to transform raw data into compelling narratives that inspire change and guide smarter business decisions.

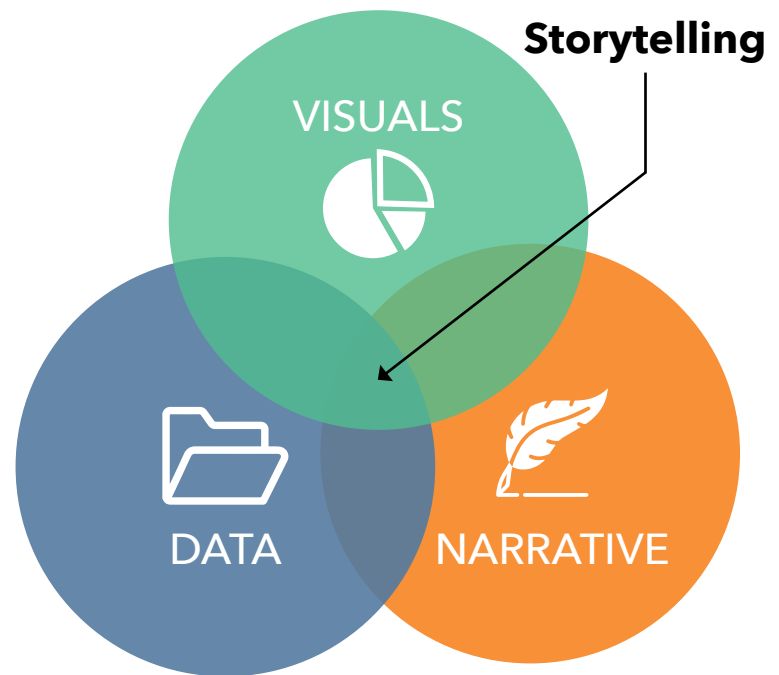
How Predictive Analytics Can Anticipate Needs and Resolve Issues Faster

One of the most exciting applications of AI in CX is the use of predictive analytics to anticipate customer needs before they even arise. Predictive models analyze patterns in customer behavior, allowing businesses to forecast potential issues and address them proactively. By leveraging this technology, companies can resolve problems before they escalate, enhancing customer satisfaction and reducing service costs. For example, a predictive system might identify when a customer is likely to encounter a technical issue with a product based on past interactions. Armed with this insight, your team can intervene early, offering solutions before the customer even reaches out. This proactive approach not only streamlines the experience, but builds trust and loyalty by making customers feel understood and valued.

CX Data Storytelling

Speaking about data, CX isn't just about processes – it's about people. But how do you translate that into something tangible, especially when the stakes are high, and the demand for proof of ROI looms large? The answer lies in how we handle data. While raw data gives us the facts, transforming those facts into a compelling story – through visualization and storytelling – is what truly drives change.

Let's face it: data alone can be overwhelming. Your dashboards might be rich with insights, but their impact is lost if those insights aren't communicated effectively. This is where data storytelling becomes a crucial tool in the CX leader's toolkit. It's not just about showing what happened; it's about weaving together the "why" behind the numbers in a way that resonates with everyone, from your frontline teams to the C-suite.



Why Storytelling Matters in CX

Storytelling is a necessity. The sheer volume of customer data available today is staggering, but data without context can feel lifeless. Think of it this way: your churn rate dashboard might tell you that 10 percent of customers are leaving, but what does that really mean? Why are they leaving? Who are they? By building a narrative around those numbers using real-life customer stories, challenges, and successes, you bring those statistics to life in an engaging and actionable way.

At its core, [data storytelling](#)⁵ is about making connections. And in CX, connection is everything. When you present data in the form of a story, you invite your audience to see the human element behind the numbers. You can take cold, hard data and turn it into something relatable – whether it's by illustrating a typical customer's journey through a fictional persona or exploring how a real customer overcame obstacles and renewed their subscription.

The Role of Visualization in Data Storytelling

Now, let's talk about the role visualization plays. Data visualization is like the stage on which your story unfolds. It's the tool that enables you to communicate complex insights quickly and effectively. Imagine a scatter plot showing how a customer's feature adoption increased steadily over the past year. In just one glance, you've painted a picture of growth, engagement, and success.

Effective visualizations can tell a story on their own – a churn dashboard that monitors customer health metrics, a journey map that uncovers friction points, or a heat map showing product usage patterns across segments. The beauty of visuals is that they break down complex information into digestible, universally understood insights. Instead of pages of text or long presentations, a well-placed line chart or bar graph can highlight key trends, communicate urgency, and incite action.

Turning Data Into Actionable Narratives

The magic happens when you combine storytelling with visualizations. This combination creates a narrative that not only informs but also inspires. Imagine presenting a "a year-in-the-lifestory" of a customer – a journey filled with challenges, key milestones and, ultimately, a renewal decision. Alongside that narrative, you show adoption trends in a graph, pain points on a journey map, and churn rates over time. Suddenly, the data is more than numbers – it's a story of resilience, loyalty, and the success of your CX strategy.

The trick is to humanize the data. Give the numbers context, depth, and emotion. Whether you're discussing customer retention rates or showcasing new feature adoption, turn those figures into a narrative that resonates. Share the



story of a customer who almost churned, how your team identified the issue, and the proactive steps taken to turn things around. These are the stories that stick, move beyond sterile metrics, and drive real action.

Driving Results Through Empathy and Connection

Ultimately, CX is about building relationships, and storytelling is your bridge. It's your opportunity to blend empathy with insight and connect with your audience on a deeper level. As a CX leader, your job isn't just to present data and make people care. And that's where storytelling shines: by turning customer data into engaging narratives, you transform it into something that compels your team, executives, and the entire organization to act.

Data storytelling isn't just about communicating the past, it's about shaping the future. By leveraging the right visualizations, weaving compelling narratives, and connecting those insights to real-world outcomes, you empower

your organization to understand your customers and anticipate their needs – and that’s where the true power of CX lies.

The Road Ahead

In the end, CX is all about one thing: connection. As we head into 2025, it’s clear that the most successful companies will harness the power of data and emotional intelligence to build authentic relationships with their customers. AI and technology will continue to play a critical role, but the human touches – empathy, understanding and thoughtful interactions – will truly set brands apart. By equipping agents with the skills they need to navigate complex, emotionally charged situations, companies are not just solving problems, they’re creating advocates, fostering loyalty, and driving long-term success.

The future of CX lies in the balance between AI’s efficiency and human connection’s irreplaceable value. As we face an evolving landscape filled with new challenges and opportunities, the

companies that rise to the top will prioritize both cutting-edge tools and the people behind them. Whether it’s through personalized journeys, frictionless experiences, or data storytelling, the heart of customer experience remains the same: making customers feel seen, heard, and valued at every turn. 🌐

Links

- 1 <https://www.fastcompany.com/90759802/the-ultimate-science-backed-guide-to-emotional-intelligence-at-work>
- 2 <https://www.techtarget.com/searchcustomerexperience/tip/Best-practices-for-contact-center-quality-assurance>
- 3 <https://www.roberthalf.com/us/en/insights/research/todays-customer-service-jobs-can-offer-long-and-satisfying-careers>
- 4 <https://www.gartner.com/en/newsroom/press-releases/2023-08-30-gartner-reveals-three-technologies-that-will-transform-customer-service-and-support-by-2028>
- 5 <https://powerbi.microsoft.com/en-us/data-storytelling/>





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BRAND SPOTLIGHT

Target



In this insightful Brand Spotlight with John Caldwell, Senior Director of Team Member Service Centers at Target and an Execs In The Know Advisory Board Member, readers will discover how his leadership philosophy, shaped by decades of experience, centers around the belief that when you take care of your team, everything else falls into place. John also sheds light on how Target is leveraging early-stage artificial intelligence (AI) to support team members and improve customer service efficiency while remaining thoughtful about the balance between automation and human connection. Additionally, he shares his perspective on the future of customer experience, emphasizing the importance of addressing root causes to enhance employee and guest satisfaction.



John Caldwell

Senior Director Team
Member Service Centers
at Target

Execs In The Know (EITK): You started your career at Target in stores and are currently the Senior Director of Team Member Service Centers. How has your early store experience shaped your leadership approach in the service centers?

John Caldwell: My time in stores was so foundational to how I lead today. If you take care of the team, they'll take care of the guest, and everything else will follow. For me, that is true, no matter where you sit in an organization or what your level or role is on a team. Take care of those around you, and the rest will follow.

EITK: Target is known for its customer-centric brand identity. How does the work of the Team Member Service Centers contribute to enhancing Target's overall customer experience?

John: My team plays the role of helping our team members in the field (our Stores and Global Supply Chain and Logistics teams) solve problems so they can focus on our guests. Whether it's technology not working or changing a trailer delivery, our team wants to fix the issue so our field teams can get back to their number one priority: helping our guests.

EITK: Your team supports multiple areas, such as technology, facilities, supply chain, and travel services. What are some unique challenges and opportunities of overseeing such diverse service areas within a large organization like Target?

John: I mentioned that one of our focuses is solving problems, but another that's just as important is providing insights back to the enterprise to fix the root cause. Everyone is focused on that across the company. It can be challenging to connect insights and trends across all those domains so that as a company, we can better prioritize what to pursue next. That's also an area of exciting opportunity.



EITK: AI and automation are rapidly transforming service centers. How is Target leveraging AI in its service centers, and what impact have you seen on team performance and customer satisfaction?

John: We are in the very early stages of leveraging AI in our Service Centers, but the early learnings are exciting. For our teams, we see the potential for faster and better access to the information they need to help our guests. Automation has always been important to us, but we are really thoughtful about where and when. It can't be only about our efficiency. It has to help our teams and guests do things easier. We'll continue to focus on that.

EITK: You've led teams through significant transformations. What strategies have been most effective in driving team engagement and delivering exceptional service?

John: I'm a huge believer that transparency, clarity, and honesty are critical to the trust that allows teams to thrive in change and deliver results. Even the simple act of admitting we don't

know is powerful. When we are clear about our mission and create safe spaces so that everyone in the organization can seek clarity about what we are trying to accomplish and their role in that mission, the results will follow.

EITK: Customer satisfaction (CSAT) is a critical metric in service operations. How do you ensure that Target's service centers consistently meet or exceed CSAT goals, and what role does customer feedback play in this process?

John: Our Service Centers have three areas of focus: Experience, Value, and Team. CSAT is a critical objective in the Experience bucket. Each of our Service Centers have robust plans and strategies to not just meet but exceed the experience expectations of our guests. CSAT is an important way we hear from our guests about how we are doing, but it isn't the only way. We use it along with other listening methods, including call listening, focus groups with our front-line teams, visits to our stores and supply chain facilities, and more.

EITK: Target has a reputation for innovation in retail and operations. Can you share any recent technological advancements or innovations within the Team Member Service Centers that have positively impacted customer and employee experiences?

John: The most recent innovation for us is to leverage the technology we use to capture guest sentiment to now capture team member sentiment when interacting with Team Member Service Centers. This will also help us to better understand where we can focus to improve the experience for our team members.

EITK: With over 32 years at Target, you've witnessed substantial changes in customer expectations. How have Target's service centers adapted to evolving customer needs, particularly in today's digital-first world?

John: One of the biggest changes I've observed is the evolution of guests' options and preferences to get help, just as their expectations of support have evolved. They

want to get help in the way they prefer, have access to more information than ever, and expect companies to live up to their brand promise. We are all-in on that evolution by offering multiple channels for support, ensuring our teams have the correct information, tirelessly working to restore our guests' faith in Target, fixing the root cause of the issue, and preventing it in the future.



EITK: What strategies do you use to balance staffing and service quality, particularly in a fast-paced retail environment like Target?

John: This is a real challenge everyone who cares about customer experience faces. Of course, we do many of the things others do, like having the right partner relationships and the right locations and navigating the tradeoffs between cost and quality. Our strategy that focuses on the demand lifecycle serves us well: focus on fixing the root cause of the issue and automating resolution to reduce demand; this provides the capacity to invest in a highly talented team that is uniquely equipped to help our guests and provide the insight back to the enterprise that enables partners to eliminate issues.

EITK: As you look ahead, what excites you the most about the future of customer experience at Target, and how do you see the role of Team Member Service Centers evolving in the next few years?

John: Our Service Center teams are an extension of our front line teams in the field clear – brands and we continue to work together to solve problems for and delight our guests. That has been a great journey, and I'm excited to see it continue to evolve as our teams in Team Member Service Centers elevate their role in providing insight to solve the root cause, identify issues before they are noticed, and make it really easy for our team members to get the help they need.

EITK: Looking back on your career journey at Target, what has been the most rewarding experience or accomplishment that stands out to you?

John: Without a doubt, logging in daily or walking into a store and seeing the best team in action. The connections I've made over the years, the mentors who have helped me, and the smiles and laughs I'll carry with me forever. Finding a company that aligns with my values and leadership style is something I'm thankful for every day.

EITK: How would you describe your leadership style?

John: I believe everyone is trying their best and as a leader it's my role to help them identify and remove the roadblocks getting in their way. I want people to come to work faster than they go home. I want their dinner table conversations about where they work to be joyful. I work really hard to create a culture that brings all that to life.

EITK: As an Execs In The Know Advisory Board Member, you're part of a community of leaders shaping the future of customer experience. How has your involvement with Execs In The Know influenced your work at Target?

John: Being part of this community of leaders committed to improving the customer experience has been amazing and humbling. It's equal parts validating our approach and pushing me to think differently. For example, hearing about a company that is all-in on customer-facing GenAI made me challenge my more conservative point of view around its readiness there. 🌟



Execs In The Know

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

Thank you to John Caldwell and the Target team for contributing to the Execs In The Know Brand Spotlight.

Interested in participating in a future Brand Spotlight feature and sharing your story? Contact us at info@execsintheknow.com.

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Agent-Facing AI: Strategic Deployment in CX Operations

Discover how organizations use agent-facing AI to enhance efficiency, reduce risk, and build a strong foundation for future customer-facing AI deployments.

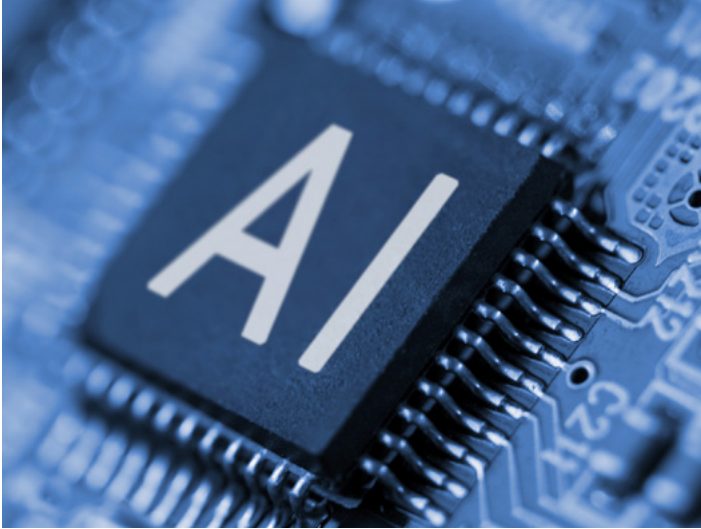
by Execs In The Know



Get the latest insights with our reports, *AI for CX: Exploring Consumer Perceptions* and *State of the Tech: AI in the Contact Center*, to discover how AI shapes consumer behavior and revolutionizes contact centers. Stay ahead with actionable data and expert analysis.

As a customer experience (CX) leader, you're no stranger to the transformative potential of artificial intelligence (AI). Our industry is evolving at breakneck speed, with AI at its core, driving efficiency and innovation. However, in the race to adopt AI, one thing is becoming increasingly clear – brands are being thoughtful and cautious even about how and where they deploy AI. While AI's role in customer-facing applications continues to grow, most companies are opting first to prioritize agent-facing AI to minimize risk, refine systems, and build a solid foundation for future growth.

This measured, pragmatic approach is strategic. Agent-facing AI allows companies to crawl, walk, and eventually run with AI, ensuring that they're building effective and scalable capabilities. This article will explore why brands start with agent-facing AI, the key trends shaping this space, what brands are doing, and how you can leverage AI to drive meaningful organizational change. We'll also touch on what's next for AI and how brands can evolve from agent-facing to customer-facing tools, all while offering actionable insights for immediate application.



Why Agent-Facing AI First?

According to our *State of the Tech: AI in the Contact Center*¹ report in partnership with ASAPP, 42 percent of organizations are using generative AI (GenAI) for agent support, while only 29 percent are applying it to customer-facing scenarios. Are you part of the growing 42 percent already using GenAI to support your agents?

The decision to prioritize agent-facing AI is intentional and strategic. Deploying AI solutions that support agents before customer-facing interactions offers several advantages, with risk management being one of the most significant. Any misstep with customer-facing AI can directly harm the customer experience, eroding trust and damaging your brand's reputation. Seventy-one percent of CX leaders we surveyed plan to continue focusing on agent-facing AI in the next 12-24 months due to the higher risk of deploying AI in customer-facing roles.

AI is not yet sophisticated enough to handle complex emotions or nuanced interactions, making customer-facing deployments riskier. By starting internally, brands can test AI's capabilities, gather feedback, and refine their systems in a controlled environment. Agent-facing AI allows for errors to be caught and corrected before they reach the customer, providing a safer testing environment.

Build Feedback Loops for AI Development

To further mitigate risks, it's essential to create strong feedback loops between your AI systems and internal teams. This allows for continuous improvement, ensuring that issues are addressed early. Regular testing and iteration prepare AI systems for customer-facing applications, giving brands the confidence that their AI tools are ready for prime time – refined, trustworthy, and effective from the start.

The Value Chain in the AI Conversation: Crawl, Walk, Run

AI's role in the CX value chain is evolving, but it typically starts with handling foundational tasks – order-taking, gathering insights, and problem identification – before moving on to more complex functions. Many companies are adopting a crawl, walk, run, or start small and scale gradually approach to AI deployment. In our *Artificial Intelligence for CX: Exploring Consumer Perceptions* report in partnership with Gladly, fifty-five percent of consumers are open to AI-powered interactions for quicker resolution but still prioritize accuracy.²

Integrating AI tools can streamline workflows by handling basic tasks like gathering insights, automating routine administrative functions, or providing support to agents. Focus on areas where AI can enhance efficiency without exposing the company to high risks. By starting with simple tasks, AI is allowed to prove its value in controlled environments before being scaled to handle more complex customer interactions.

The progression from basic automation to real-time decision-making support is where AI can start delivering true value. For instance, after successfully deploying AI for data entry and order processing, the next step is to use it for proactive problem-solving – identifying potential issues in real time and providing solutions before they escalate.

Prioritize AI for Order Processing and Error Detection

Start by deploying AI in roles that are less visible to customers but critical to internal operations. Order processing, data gathering, and error detection are excellent places to begin. Once the AI demonstrates its value in these areas, you can move on to more visible applications like customer interaction support or issue resolution.

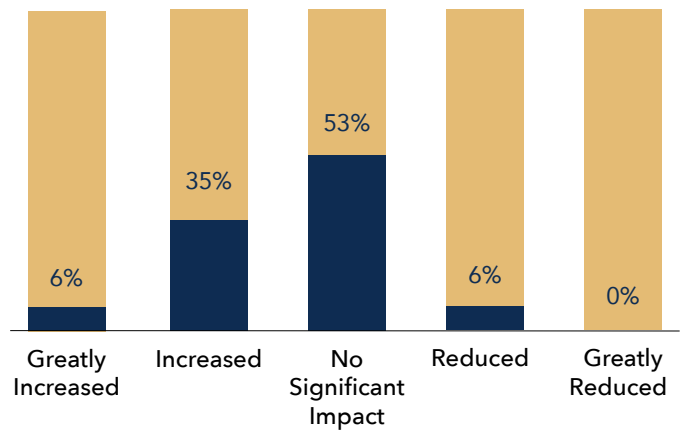
Start with AI for Real-Time Assistance

For CX leaders looking to improve agent productivity, you can implement AI tools that assist with real-time support. Sixty-three percent of organizations found AI has improved agent workflows,³ suggesting real-time guidance enhances performance. GenAI, such as natural language processing (NLP) tools, has become increasingly popular in agent-facing applications. These tools can help agents craft responses, identify customer sentiment, and predict the next steps in the conversation. AI-driven tools that support agents result in faster problem resolution and improved operational efficiency.⁴

Not only will this enhance your team's efficiency, but it will also ensure that they are better equipped to handle more complex, high-stakes customer issues.



What has the use of AI at your organization done to your overall Customer Satisfaction scores?



Following the implementation of AI within CX operations, a decrease in CSAT scores was observed by only a single respondent (amounting to 6% of the total), while 41% of respondents observed an overall CSAT score that either "Greatly Increased" or "Increased," with about half (53%) indicating there was no significant impact, either positive or negative.

AI as a Performance Enhancer, Not a Replacement

One of the primary roles of agent-facing AI is to enhance human performance, not replace it. AI tools can augment an agent's capabilities by providing real-time knowledge, suggesting solutions, and offering guidance based on historical data. This reduces the cognitive load on agents, allowing them to focus on more nuanced and complex customer interactions.

For example, many companies use AI to automatically populate customer details, gather relevant case history, and suggest the next best action. This ensures that agents are better prepared to handle customer requests quickly and accurately, improving both agent performance and customer satisfaction.

Reducing Agent Cognitive Load

AI isn't just about efficiency – it's about creating a better work environment for agents. AI reduces the mental strain on agents by taking on mundane tasks such as data entry, ticket

creation, and routine troubleshooting. This allows them to focus on more strategic aspects of their role, leading to improved job satisfaction and, by extension, better customer interactions. Forty-five percent of consumers⁵ still prefer interacting with human agents over AI, even if AI offers speed. This reinforces the idea that agent-facing AI should complement agents by handling routine tasks.

Once these systems are fine-tuned and your team is confident in their capabilities, you can expand their use to more complex functions, potentially involving customer interactions.

What Brands Are Doing with Agent-Facing AI

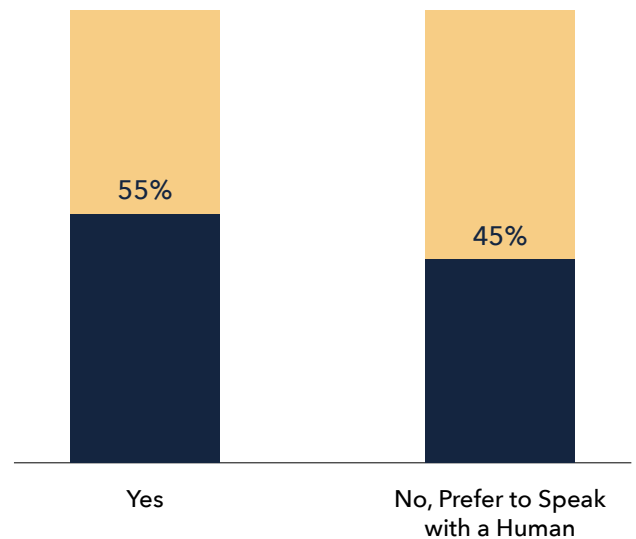
Brands across various industries leverage these tools to streamline operations and enhance the customer experience. Below are a few examples of how top companies are deploying agent-facing AI to great effect.

GoodLeap is an excellent example of how AI can transform internal operations. Their AI assistant, Gabby, acts as a co-pilot for agents, offering real-time access to SOPs, training materials, and policy documents. This tool enables agents to find information within seconds, reducing time spent on searches and allowing them to focus on solving customer problems. As Paul Brandt, Chief Experience Officer at GoodLeap mentioned, this tool has significantly improved agent satisfaction and performance.⁶



Similarly, BODi launched its AI tool, which deflects 36 percent of initial contact requests to the AI bot, allowing human agents to focus on more complex inquiries.⁷ This tool improved operational efficiency and provided valuable insights into common customer issues, which helped BODi refine its knowledge base and further optimize its AI capabilities.

Would you be open to interacting with a virtual agent powered by AI to resolve a customer care issue if it meant you could get a faster and easier resolution?



Empowering Frontline Employees

AI is increasingly viewed as a powerful tool for enhancing customer and employee experiences. From 2023-2024, the perception of AI shifted from a potential threat to an enabler for frontline workers. Forty-two percent of organizations⁸ use GenAI to support agents, leading to faster problem resolution and improved efficiency.

Organizations are leveraging AI to provide real-time assistance, deliver one-on-one coaching, and conduct group training, thus boosting employee engagement and improving customer outcomes. For example, 46 percent of organizations use AI to provide real-time guidance during customer interactions.⁹

Streamlining Agent Workflows

AI is transforming customer service teams by automating routine tasks and allowing human agents to focus on complex, expertise-based work. Human agents can now seamlessly take over conversations from AI agents,¹⁰ with full context on the customer and issue at hand, without requiring the customer to repeat themselves. This integration accelerates resolution times and improves satisfaction.

Enhancing Productivity

AI technology supports employee productivity by offering suggestions, automating ticket management, and optimizing help center operations. For instance, Zendesk AI copilots assist human agents by merging similar tickets and managing intelligent routing,¹¹ thereby boosting operational efficiency.

Shift Toward AI-Driven Quality Assurance

Nearly two in five organizations (39 percent)¹² have adopted AI to provide unbiased scoring of agent performance during customer interactions. This allows for more objective employee performance assessments and helps tailor training to improve specific areas of need.

Benchmark Your AI Strategy

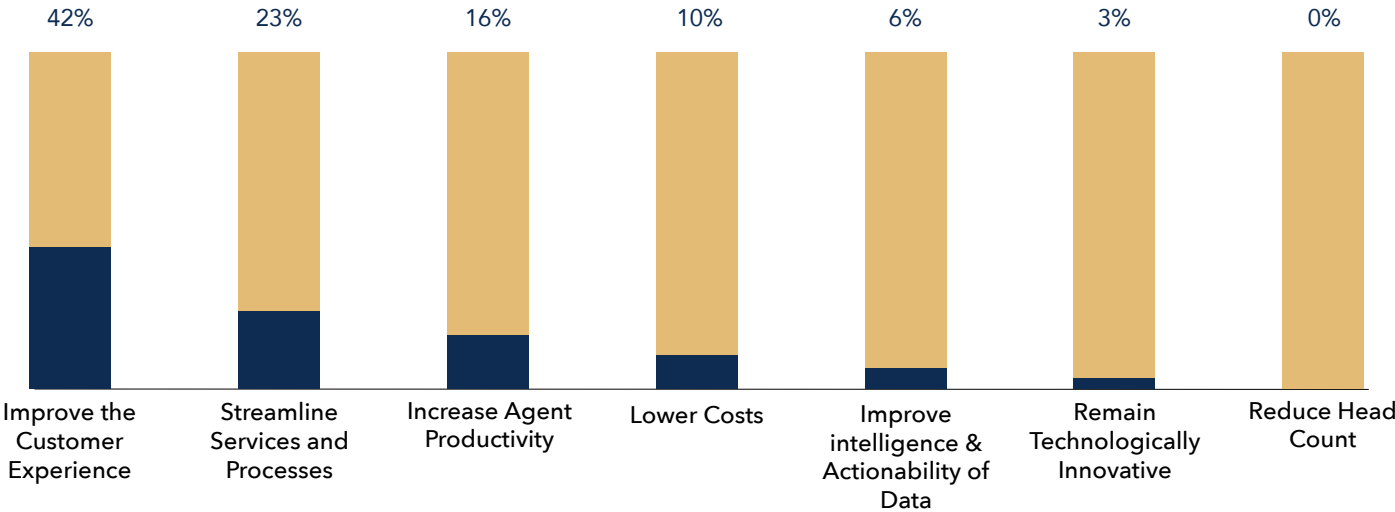
Benchmark your AI strategy against other industry leaders to stay ahead of the curve. Look at what top brands do with agent-facing AI and assess how your organization can incorporate similar tools. Track key performance indicators (KPIs) such as deflection rates, agent satisfaction, and time-to-resolution to measure the success of your AI initiatives.

What’s Next for AI in CX?

AI will continue to play a pivotal role in transforming the workplace. As AI technology advances, we can expect to see a shift from primarily agent-facing tools to broader customer-facing applications. However, this transition will require significant improvements in AI’s ability to handle complex customer needs, especially in areas that require empathy and emotional intelligence.

As AI becomes more sophisticated, brands can deploy it across multiple customer touch points, creating seamless omnichannel experiences where AI supports agents and customers in real-time. According to Zendesk,¹³ over the next three years, agents will need to become more comfortable using AI, as they will depend on it for faster, more personalized resolutions.

How would you best describe your organization’s primary motivation for deploying or thinking about deploying AI-powered CX solutions and technologies?



Unified Workspaces: AI will enable streamlined work environments where agents can handle all tasks from a single, unified interface. This will significantly reduce the need for agents to juggle multiple tools or tabs, improving both productivity and efficiency.

GenAI's Expanding Role: AI is expected to revolutionize customer service by handling an increasing volume of interactions. Eighty percent of all interactions will be resolved by AI within the next three years.¹⁴ This shift will free up human agents to handle more complex issues, allowing businesses to scale efficiently without increasing staffing levels.

Personalization and Proactive Engagement: AI will continue to drive personalized and proactive customer engagement by leveraging real-time data to anticipate customer needs. GenAI will enhance self-service options, enabling AI agents to deliver accurate, real-time solutions across multiple channels, such as chat, voice, and visual content.

Align AI Tools with Long-Term CX Goals

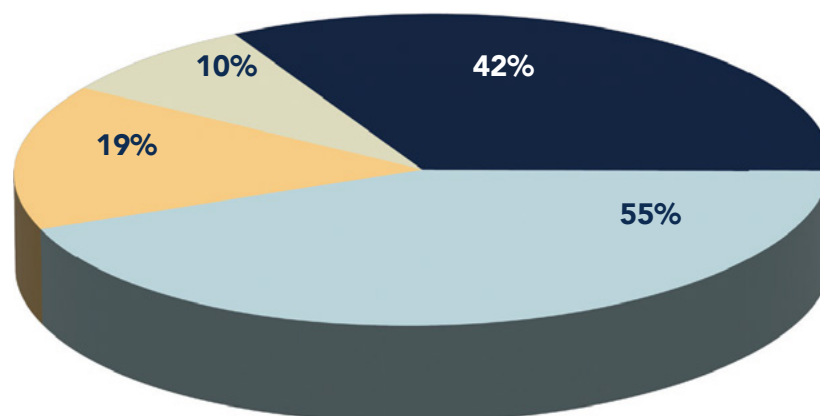
As you prepare for the next wave of AI, ensure that your tools align with immediate operational needs and long-term CX goals. Focus on AI solutions that can grow with your organization, scaling from internal support to customer-facing applications. This will ensure your AI deployment is future-proof and flexible enough to adapt to changing customer expectations.

A Path Forward

For CX leaders, the journey to AI adoption starts with strategic deployment. By focusing first on agent-facing AI, you mitigate risk, improve operational efficiency, and build a solid foundation for the future. This approach gives your teams the tools to succeed in a controlled environment where mistakes can be corrected before they impact customers. It also provides a valuable feedback loop that allows you to fine-tune your AI systems before rolling them out to a broader audience.

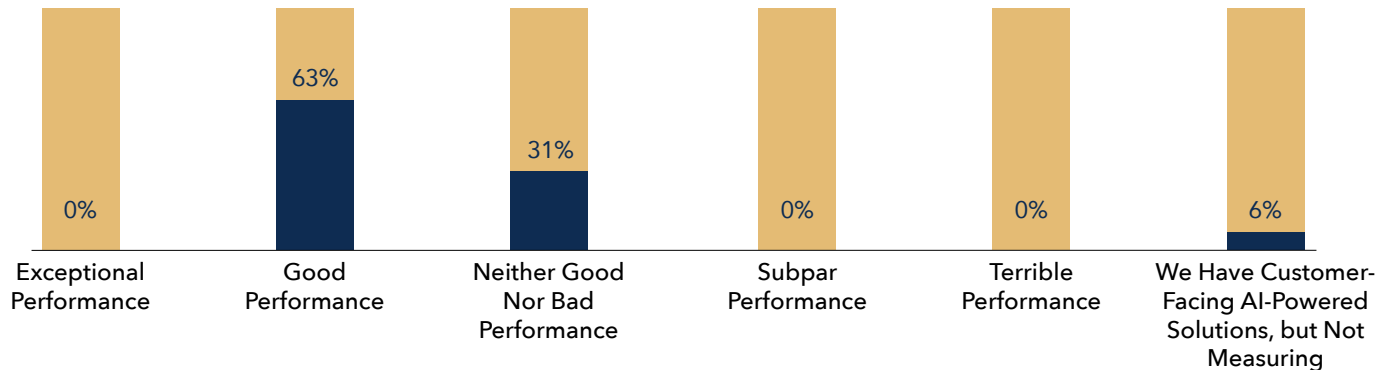
As you move from crawling to walking and eventually to running, remember that the goal is

How would you categorize the AI-powered CX solutions implemented in your contact center today?
(Select all that apply.)



- Generative AI: AI that creates new outputs on the fly, such as ChatGPT or products based on other large language models
- Non-Generative AI/Machine Learning: AI that detects patterns and makes predictions, such as forecasting, interaction routing, predetermined bot flows, and journey analysis
- Not Currently Utilizing AI for CX in Any Capacity
- Other

If you are measuring the performance (CSAT, Resolution, Abandonment, etc.) of your customer-facing AI-powered CX solutions, how would you describe the performance?



not just to adopt AI for the sake of technology, but to enhance both customer experience and operational outcomes. Start by integrating AI in critical but low-risk areas, such as order processing, agent support, and data gathering. From there, expand AI's role gradually, ensuring that it aligns with your broader CX goals.

The Future of AI with a Customer-Centric Approach

Looking ahead, AI will undoubtedly become a cornerstone of customer experience strategies. However, it's crucial to maintain a customer-centric approach as you evolve your AI capabilities. AI can be a powerful tool, but its success ultimately hinges on how well it complements human intelligence and empathy.

Links

- <https://execsintheknow.com/state-of-the-tech-ai-in-the-contact-center/>
- <https://execsintheknow.com/artificial-intelligence-for-cx-exploring-consumer-perceptions/>
- <https://execsintheknow.com/state-of-the-tech-ai-in-the-contact-center/>
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By preparing now, you position your organization at the forefront of AI-driven innovation, ready to deliver meaningful, personalized experiences that strengthen customer loyalty and set your brand apart. The journey may be incremental, but the long-term benefits of a well-executed AI strategy are clear. Stay focused on delivering value at every stage, and you'll keep pace with AI advancements and take charge of transforming the customer experience for the future.

AI is the future. But we must take a deliberate and thoughtful approach to get there successfully. Start with agent-facing AI, refine, test, and optimize, and only then will you be ready to unlock its full potential for customer-facing applications. By doing so, your organization will walk, then run, into a future where AI plays a pivotal role in delivering exceptional CX.

CONSUMER OPINIONS ON AGENTS

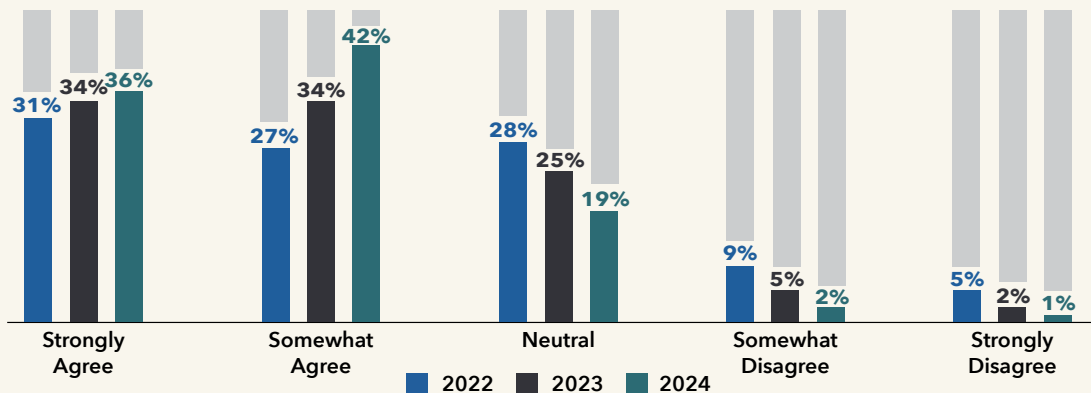


In partnership with ACT, our 2024 *CX Leaders Trends & Insights Consumer Edition* report introduces 10 new findings in the "Views on Agents" section.

The report provides invaluable insights into the current state of CX and highlights key trends reshaping how companies interact with consumers.

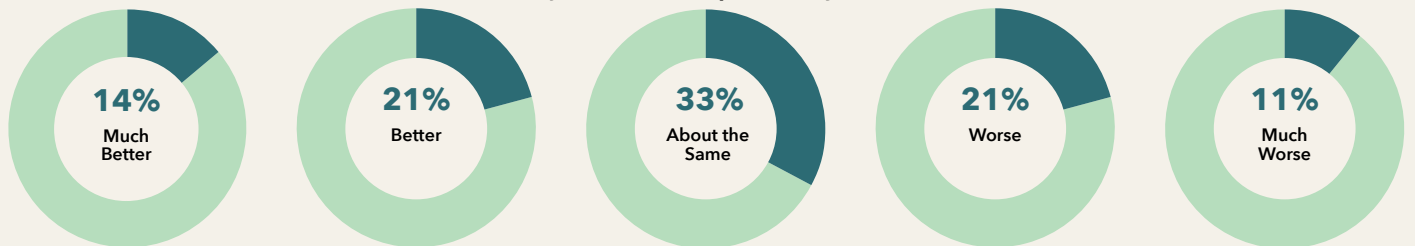
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How do you feel about the following statement: It is important for customer care agents to be very passionate about the brands they represent.



Do you think customer care agents have gotten better or worse at their jobs over the past 3-4 years?

2024



In which area should companies focus their resources when it comes to training customer care agents?



Metrics That Matter: KPIs for BPO Success

Discover how the right KPIs can drive success by aligning performance with your business goals.

by Execs In The Know

In an era where accelerating technological innovation, competitive pressures, and soaring customer expectations define success, customer experience (CX) leaders are rethinking how they measure and manage their Business Process Outsourcing (BPO) partnerships. The tool to navigate this complex environment? Key Performance Indicators (KPIs).

KPIs are more than metrics or performance benchmarks. They are a strategic compass, offering insight into your BPO partner's performance while ensuring alignment with your business goals. However, the challenge isn't simply tracking these metrics but selecting the right KPIs that go beyond cost savings to drive innovation, customer satisfaction, and long-term value. How do you ensure that outsourcing your CX is a value-add?

In this article, we'll break down the KPIs to monitor, offer a blueprint for aligning them with your business objectives, share insights into avoiding common pitfalls, and what CX leaders actually want from their BPO partnerships.



What KPIs Tell You About Your Call Center

At its core, outsourcing is about trust – trust that your chosen partner will deliver the customer service your brand promises. But how do you measure that trust? KPIs paint a vivid picture of your call center's performance, giving you the data to make informed decisions and drive long-term value.

Let's begin by diving into the categories of KPIs that will help you unlock the full potential of your BPO partnership.

1. Customer Satisfaction Metrics: The Heartbeat of CX

Your customers are at the heart of your brand's success. When they're satisfied, everything else falls into place. Monitoring customer satisfaction KPIs

helps you assess the health of your outsourced call center, ensuring it reflects well on your brand and meets customer expectations.

- **Net Promoter Score (NPS):** This is a powerful indicator of customer loyalty. NPS is more than just a score – it reflects how well your outsourcing partner represents your brand. When customers are asked, "On a scale of 1-10, how likely are you to recommend us to a friend?" their answer directly correlates to the quality of service.
- **Customer Satisfaction Score (CSAT):** CSAT offers a snapshot of short-term customer happiness, often immediately after a service interaction. Answer options typically range from "Very unsatisfied" to "Very satisfied," and it's a good idea to leave space for customer feedback. This KPI is essential for monitoring your outsourcing partner's day-to-day performance and adjusting quickly to service gaps.



- **Customer Effort Score (CES):** How easily can your customers resolve their issues? A low CES suggests a smooth customer experience, while a high CES means friction points that must be addressed. Lower effort correlates with higher loyalty – a key goal for any CX leader.

These KPIs give you the pulse of customer interactions, but customer satisfaction alone isn't enough. It should be balanced with operational efficiency, quality of service, and employee performance to ensure long-term success.

2. Operational Efficiency Metrics: Doing More with Less

Operational efficiency KPIs are critical for understanding whether your outsourced call center delivers value at the correct cost. They help you evaluate productivity, identify bottlenecks, and optimize agent performance while maintaining quality service.

- **Average Handling Time (AHT):** AHT measures an agent's average time on a call. While reducing AHT

can lead to cost savings, it should be balanced with customer satisfaction. Too short, and you might compromise service quality; too long, and you risk inefficiency. Finding that balance is vital.

- **First Call Resolution (FCR):** FCR is a gold standard metric for operational efficiency. It measures the percentage of customer issues resolved on the first contact. A high FCR reduces repeat calls and improves customer satisfaction, making it a win-win for both efficiency and CX.
- **Service Level Agreement (SLA) Adherence:** SLA adherence measures how consistently your call center partner meets the service levels you've set in your contract. High SLA adherence builds trust and ensures your BPO provider delivers on its promises.

Tracking these metrics ensures that your BPO partner is efficient and effective. However, operational efficiency without service quality is a hollow victory. That's where quality of service KPIs come in.

3. Quality of Service Metrics

Maintaining high service standards is non-negotiable. Quality of service KPIs give insights into how well your BPO provider adheres to your expectations and delivers a consistent customer experience.

- **Quality Assurance (QA) Scores:** You can assess whether agents meet your quality standards by evaluating their interactions against predefined criteria, such as communication skills, product knowledge, and problem-solving abilities.
- **Error Rate and Accuracy:** This KPI tracks the number of errors or instances of misinformation in customer interactions. A low error rate means customers receive accurate information, which is crucial for building trust and ensuring satisfaction.
- **Compliance with Scripts and Procedures:** Consistency is critical in customer interactions. Measuring how well agents follow scripts and procedures helps maintain service uniformity, reduce risks, and ensure regulatory compliance.

These metrics are essential for monitoring day-to-day performance, though they don't tell the whole story. To get a complete picture, monitor employee performance metrics as well.

4. Employee Performance Metrics

The health of your outsourced call center is only as strong as the team that powers it. Monitoring employee performance metrics ensures your outsourcing partner manages their agents effectively, which translates directly into better customer service.

- **Agent Utilization:** This KPI measures the percentage of time agents spend on customer-focused activities. While high utilization rates indicate efficiency, be cautious – overworked agents can quickly burn out, leading to poor performance and higher turnover.
- **Agent Turnover Rate:** High turnover rates can be a red flag. It might signal issues with job satisfaction, training, or management practices within your BPO's team. Keeping an eye on this metric ensures that your outsourcing partner retains skilled, experienced agents who know how to handle your customers.
- **Agent Attrition Rate:** Attrition is a longer-term indicator of employee engagement and job satisfaction. High attrition rates might indicate systemic issues within your BPO provider's workforce management practices, such as inadequate training or compensation.

Together, these KPIs form a holistic picture of how your BPO provider is performing across all levels – from customer interactions to employee engagement. But simply tracking metrics isn't

enough. Set the right benchmarks to maximize value and ensure your KPIs align with your business objectives.

Monitoring KPIs

Having the right tools to track KPIs is essential to measure and enhance your call center's performance effectively. These tools vary in functionality and purpose, but each can help you optimize your outsourcing KPIs. Let's explore five tools that can help drive better outcomes for your call center operations.

1. Software with Data Analytics

Do you have robust call center software with data analytics in your tech stack? It allows you to monitor a wide range of KPIs in real-time. For instance, you can track SLA adherence by analyzing how quickly calls are answered or evaluate FCR rates to see how efficiently customer inquiries are being resolved.

2. Third-Party Analytics

In addition to native tools, third-party analytics platforms provide a more detailed, comprehensive look at your call center's performance. These platforms can collect and analyze data, revealing trends and identifying potential performance gaps. For example, they can visualize peak call times or create heatmaps to display call volume fluctuations, enabling better resource allocation and staffing decisions.



3. Customizable Dashboards

Customizable dashboards are vital for presenting complex data in a clear and actionable way. These dashboards allow different teams to tailor their views according to specific KPIs. For example, a QA manager might track error rates and QA scores, while an operations manager may prioritize AHT and FCR metrics.

4. Cloud-Based Solutions

Cloud-based tools have revolutionized call center management by enabling real-time KPI monitoring, scalability, and enhanced collaboration across multiple sites. These solutions allow managers to track critical metrics like CSAT from anywhere, ensuring seamless communication and consistent performance management across locations.

5. QA Tools

QA tools are essential for maintaining high standards in call center interactions. They enable managers to evaluate agent performance, track call resolution times, and gather customer feedback. QA software helps you ensure that your team consistently meets or exceeds performance expectations by monitoring key parameters and assessing individual agent scores.

These five tools are instrumental in helping call center leaders track, manage, and improve their BPO KPIs, ensuring the highest levels of efficiency and customer satisfaction.

Common Pitfalls to Avoid

While KPIs are invaluable for assessing your BPO provider, several common mistakes can undermine your efforts.

- **Overlooking Employee Feedback:** Your agents have a front-row seat to your call center's day-to-day operations. Their feedback is critical for identifying issues before they escalate. Make sure to incorporate employee insights when assessing KPIs.
- **Focusing Only on Cost-Saving Metrics:** While cost reduction is essential, focusing too narrowly on it can strip your call center of the resources needed to maintain service quality. Balance cost-saving metrics with customer-centric KPIs like CSAT and NPS.
- **Ignoring Trends in Data:** Monitor overall trends and patterns to spot recurring issues or potential roadblocks affecting customer service while also identifying areas that excel beyond the norm.
- **Tracking Too Many Different KPIs:** Too many metrics can scatter your focus. Streamline your efforts by tracking the most critical KPIs that align with your business's goals.
- **Not Aligning KPIs with Organizational Objectives:** KPIs should reflect your company's long-term goals. If the metrics you track don't align with your strategic objectives, you'll miss the mark in your call center operations.





Driving Innovation and Growth

As the CX landscape continues to evolve, so should KPIs. Today's KPIs should measure current performance and pave the way for future growth and innovation. This means incorporating metrics that track technological adoption, flexibility, and the ability to innovate.

For instance, monitoring the adoption rate of new technologies, such as AI-driven automation or machine learning tools, can offer insights into how your BPO provider positions itself for the future. Similarly, tracking how quickly your provider can implement new solutions – like AI-driven analytics – will give you a sense of their adaptability and long-term value.

Staffing and Retention

We all know KPIs are only as good as the team behind them. Your BPO's ability to hire and retain the right talent directly impacts their performance on key metrics. Contact center attrition rates hover between 30 and 45 percent, with some industries seeing [rates as high as 65 percent](#).¹

Is your BPO incentivized to hire and retain top talent? How well is your BPO managing turnover, not just at the agent level but also in leadership? Prioritizing these areas ensures your BPO partner has the right team to consistently meet your standards.

Keeping KPIs Consistent

Keeping KPIs consistent across the board is critical if you're working with multiple BPO vendors.

Consistent KPIs allow direct comparisons, helping you decide which partner drives more value. Are your KPIs aligned across your vendors? If not, it's tough to know who's genuinely outperforming.

Tying KPIs Into Your SLA

The SLAs you establish with your BPO provider aren't just about hitting targets – they're about setting the tone for the partnership. Are the KPIs embedded in your SLA still relevant? Do they drive the results you need today, or are they relics of a previous era when hitting ASA was the pinnacle of customer service? KPIs are the markers that confirm targets are met, enabling leaders to move forward with deeper, more meaningful strategic conversations.

Your SLA is a dynamic tool that evolves with your business and ensures your BPO partner delivers value that aligns with your strategic objectives. When you review those SLAs, ask yourself: Are we holding our BPO partner accountable for more than just meeting the bare minimum? Are we incentivizing them to push for innovation, efficiency, and customer delight? Whatever your industry, your KPIs should be tailored to reflect your unique challenges.

What CX Leaders Really Want from BPOs

Recent research from Execs In The Know, in partnership with NICE, offers insights into how CX leaders view BPO partnerships. The [Exploring Corporate Opinions on BPOs](#)² report, published in

February 2024, gathered responses from 52 CX leaders across various industries, including B2C and B2B companies. The findings reveal a stable market for BPO services, with 62 percent of respondents already leveraging BPOs for agent resources – rising to 75-80 percent among mid-cap and large organizations.

However, while cost savings remain a top driver for outsourcing (identified by 33 percent of respondents), the report highlights a shift in expectations. Brands now want more from their BPO providers, seeking partners who understand their business at a deeper level – particularly in recruiting, onboarding, training, and ongoing coaching.

Sixty percent of respondents are willing to pay more for BPO services incorporating cutting-edge technologies such as AI, automation, and analytics. This reflects a growing desire for strategic partnerships that offer more than operational efficiency – ones that can drive long-term value and innovation. Collaboration and alignment also

emerged as key concerns, with one-third of CX leaders citing the need for improved integration between BPO providers and internal teams to achieve meaningful business outcomes.

This report underscores the importance of selecting BPO providers who deliver strategic value for CX leaders and serves as a clear call to action for BPO providers: Those who can blend operational excellence with innovation will thrive in an increasingly competitive space.

A Strategic Tool for Growth

Customer expectations are rising, which means KPIs must do more than capture current performance. They should push BPO providers – and your business – toward innovation, improved customer satisfaction, and sustained success.

Are the KPIs you track still relevant today? Are they helping you manage operations while preparing for tomorrow's challenges? With the right KPIs in place, your BPO partnership becomes a key driver of your brand's future success. 📊

1. <https://www.wsj.com/articles/companies-call-in-better-pay-and-perks-for-contact-center-workers-11640608201>
2. <https://execsintheknow.com/exploring-corporate-opinions-on-bpos/>





Execs In The Know



THE LEADERSHIP TABLE

An Executive Dinner Series

The Leadership Table is an exclusive dining experience for forward-thinking CX leaders. More than just a meal, this is your chance to connect with like-minded peers, gain actionable insights, and explore strategies to stay ahead – all in an intimate, relaxed setting.

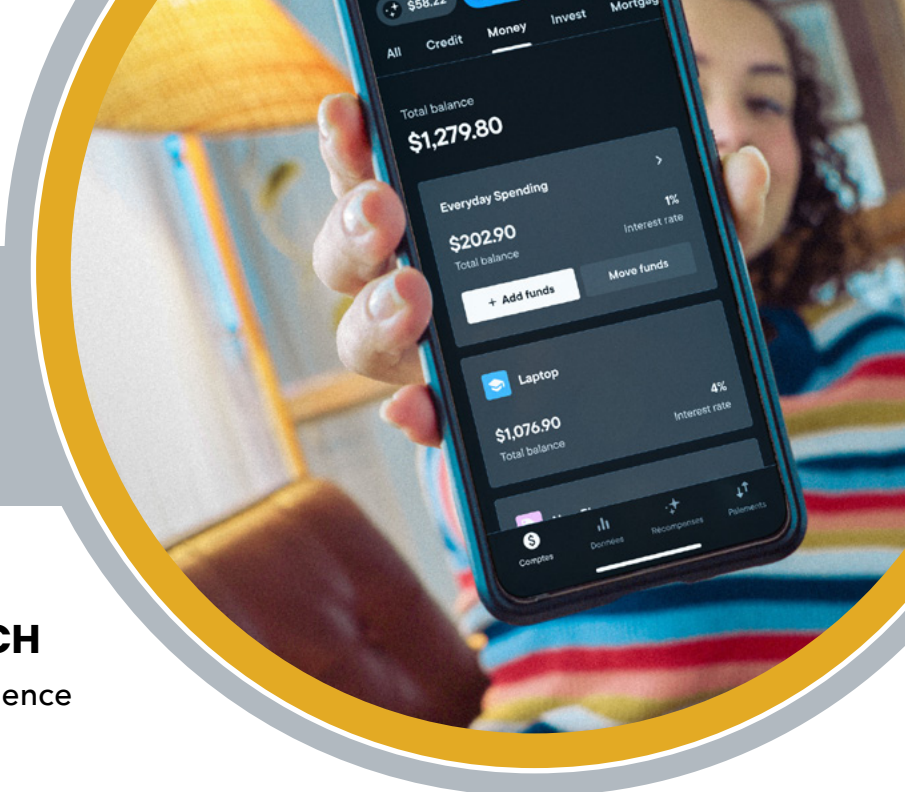
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KIA ONLINE COMMUNITY MEMBER SPOTLIGHT



SHANNON BURCH

Vice President Experience
Neo Financial



In our latest KIA Spotlight, we sit down with Shannon Burch, Vice President of Experience at Neo Financial, to discuss her approach to customer experience at one of Canada's fastest-growing challenger banks. Shannon shares insights into how Neo Financial leverages innovation and customer-centricity to disrupt a 200-year-old banking oligopoly. She discusses the importance of testing and learning with new technologies and how real-time access to knowledge drives efficiency and eliminates the need for traditional training models. Additionally, Shannon highlights the role of collaboration in resolving complex customer issues, emphasizing that at Neo, every team member contributes to creating a seamless, memorable experience. Get ready to explore how Shannon's strategic leadership is shaping the future of customer experience.

The great thing about being a tech company is that we love to test and learn with the latest tech. Neo is always testing new features and products for our software partners. In return, our partners value the feedback that Neo experience provides, and they often change their roadmap to accelerate or decelerate a particular product or feature.

Execs In The Know (EITK): What drew you to a career in customer experience, and what excites you most about your role as VP of Experience at Neo Financial?

Shannon Burch: At the heart of every business is its customers. I find it genuinely fascinating to understand how they engage with brands, make purchasing decisions, and ultimately influence the business's bottom line. I might get more excited than most about understanding customers – not just because I believe they deserve an efficient experience to foster loyalty, but because loyal customers are essential for building a successful and profitable business.

When the opportunity to join Neo Financial came along, I didn't hesitate to say yes. Over the past three years, I've brought more than 20 years of experience in leading large operational and sales businesses to Neo, where we've created a financial experience that previously didn't exist.

Customer experience doesn't begin and end with human interaction; it encompasses every touch point a customer has with your brand. At Neo, customer experience isn't confined to my team alone – it's a collaborative effort with growth, product, engineering, marketing, and experience teams to add value throughout the entire customer journey. This holistic approach not only creates amazing digital and personal experiences but also drives significant revenue. There's nothing more fulfilling than working with like-minded individuals to achieve something we can all be proud of.

Having built a successful career across various businesses and functions in some of the world's largest banks, leading the Neo Experience has been the most rewarding work I've done. I'm proud of how Neo's customer experience has evolved. While we still have a long road ahead, our customers consistently express their appreciation, as reflected in our impressive Google Review rating of 4.8 stars.



EITK: Neo Financial is a Canadian challenger bank making waves in the financial industry. How do you ensure the brand stands out when creating a seamless and memorable customer experience?

Shannon: At Neo, we are transforming the banking experience in Canada, a challenge given the longstanding dominance of an oligopoly controlling 95 percent of financial assets and offering consumers limited choices with high costs. We won't achieve the transformation overnight, which is why our brand and experience consistently evolve as we learn the experience Canadians value the most.

Skilled leadership and anticipation have been key in my ability to build a robust experience for Neo. With decades of experience leading customer-centric growth organizations, I've developed a keen ability to foresee outcomes. As Neo matures, our customer experience increasingly hinges on the world-class products our teams are building. However, when customers look to build trust or seek clarity, our customer experience team is well-equipped to engage in those conversations – marking a significant evolution from where we were just a few years ago. Anticipating where our customer experience needs to be six months down the line has been crucial, especially given the unpredictable nature of building a company.

In summary, I see delivering a brand as integral to our operational framework. This integration allows us to evolve our brand in tandem with our experience delivery, minimizing disruptions and costs while maximizing value for our customers.

By establishing technology as the foundation, we can regularly adapt human capital design and processes to meet both customer and business needs.

EITK: Innovation and customer-centricity often go hand in hand. How do you balance the two at Neo, especially in a fast-evolving fintech landscape?

Shannon: Throughout my career, I have built businesses that have always included creativity and innovation to ensure success. That experience has followed me to Neo, where our culture thrives on moving quickly. We can make quick decisions by using a test-and-learn environment. We would rather fail than fail to innovate and slow the growth of the business.

In designing the operating framework we use at Neo, I anchored it in a strong knowledge management process and technology. Real-time access to information empowers people to have the correct answer at their fingertips, which ignites high productivity. It also eliminates the need for lengthy training programs, daily team huddles, in-person training sessions, and extended hold times – costs that typically increase over time and make service delivery unmanageable.

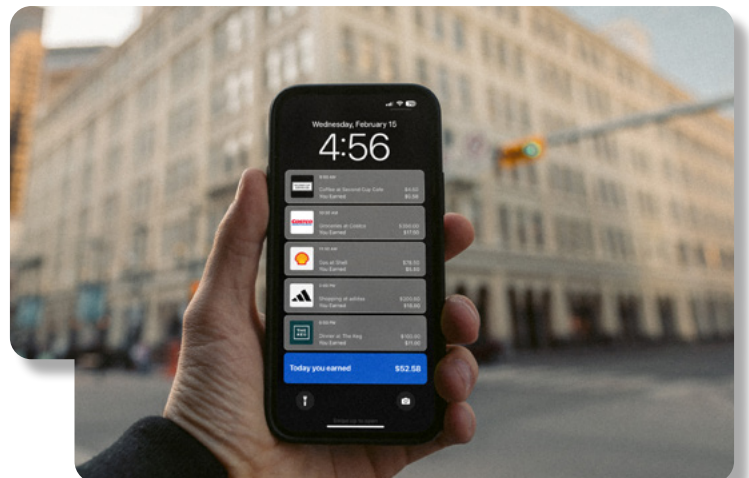
By establishing technology as the foundation, we can regularly adapt human capital design and processes to meet both customer and business needs. This approach allows us to

continuously embrace innovation and engrain it into our culture.

EITK: What are some of the most rewarding customer stories you've encountered since joining the organization? How do these moments shape your approach to CX?

Shannon: The stories from our customers are what truly motivates me and drives us forward, especially as we tackle the tough challenges of disrupting a nearly 200-year-old oligopoly with our startup. Some of my favorite stories are not just about how appreciative our customers were, but how these issues were resolved by a team effort, with everyone coming together to ensure the customer was well taken care of. Many companies claim collaboration, but at Neo, our customer stories remind us just how powerful great ideas and the execution of product, technology and processes can bring these experiences to life.

One story that really stands out to me is about a single parent who felt overwhelmed with managing her personal finances. As we know, the movement of money in Canada and the USA can be anything but customer-friendly, often bogged down by outdated technology and processes that create barriers to accessing funds. Our tech team at Neo managed to navigate these tech





barriers, not only releasing the funds but also developing a long-term solution to ensure this issue wouldn't plague her or others in the future. She described this experience as something completely new and positive, and she has since become a full-service Neo customer, frequently using our Tell a Friend referral program to share her experience across Canada. I love this story because it shows how deeply the Neo team cares about helping customers and the lengths they'll go in order to improve their lives.

Another favorite of mine involves a customer whose wallet was stolen. He did everything right – freezing his cards in the Neo app, checking his credit bureau and filing a police report – yet woke up to multiple credit alerts indicating identity theft. Though the Neo team wasn't yet online early that Saturday morning, the customer reached out via our complaints escalation email, which I check each morning. I responded immediately, assuring him everything would be okay. After alerting Neo's Fraud, CX Manager, and Product team, they all collaborated swiftly to stop the crime in

progress, gather information for authorities, and ultimately help apprehend the offender. Nobody hesitated or balked at the early hour; everyone pitched in, and within an hour, the customer was amazed at the speed with which we resolved his issue.

I believe that Neo has so many outstanding customer stories because we are all committed to transforming the banking experience for Canadians. This means that everyone, not just those who directly interact with customers, plays a crucial role in making that transformation happen.

EITK: From predictive analytics to chatbots, AI has endless potential in fintech. Can you share how Neo is integrating AI into its services and what impact it has had so far?

Shannon: As I look into the future, I truly believe that technology enhancements will become even more integral to our daily lives and work routines than ever before. By nature, Neo accepts more risk than more established organizations; however, doesn't want to take reckless leaps or be paralyzed by indecision when it comes to implementing new

innovations. That's why we agreed on a test-and-learn approach to AI, which aligns well with our company's culture. This approach has already led to incredible improvements in both the employee and customer experience, as well as enhancing our business's bottom line.

When we developed the roadmap for AI implementation, our priority was to manage risks while maximizing gains. We took a systematic approach to deploying applications in a way that ensured each step was well thought out and beneficial.

For example, our automated email responses have significantly reduced email volume, cutting it by 50 percent in the first year and eventually phasing out this channel entirely. Our scripted chatbot achieved over a 50 percent containment rate, which allowed us to eliminate the email-to-chat channel and improve first contact resolution by 100 percent, thanks to authenticated and logged-in customer interactions.

Additionally, by implementing auto-generated call and chat summaries into our CRM, we have improved the employee experience and increased consistency, resulting in a 15 percent cost reduction and a 20 percent boost in employee satisfaction. Upgrading to a GenAI chatbot has been another successful move, as we've consistently seen in-bot resolutions exceed 50 percent week after week, providing customers with timely resolutions as they manage their banking needs.

Looking ahead, I am excited about Neo's ongoing commitment to improving both employee and customer experiences through the innovative use of AI. The future holds tremendous potential for continued enhancement in these areas.

EITK: Neo is known for breaking away from traditional banking models and offering digital-first financial products. How does your team innovate to meet the ever-changing expectations of modern customers?

Shannon: I joined Neo to make a difference for Canadians and have a front-row seat to an innovative hyper-growth company, making it work. Nothing is ever off the table; it may be in the backlog, but any idea is a viable one. At Neo, our team excels at testing numerous product ideas and exploring various distribution markets concurrently. This ability is embedded in our culture because we genuinely believe we can solve the banking challenges in Canada. With that conviction, we have the risk tolerance to advance multiple initiatives simultaneously.



This mindset drives how we develop our products, marketing strategies, technology, and human interactions. Essentially, we're always innovating with the goal of creating experiences our customers haven't encountered before.

Of course, not every idea works; sometimes, we don't meet customer expectations. When that happens, we pivot quickly, without regret, recognizing that letting go of an idea is just as important as creating a new one.

Having many initiatives happening at once can make it challenging to keep customer-facing employees informed, as the timeline between finalizing and deploying a product can be short. If change management or knowledge sharing is inefficient, it can increase the costs of serving customers. Therefore, when I design an operating framework, I focus on providing easy self-service access to communication, knowledge, and learning. This is achieved through an effective knowledge management

platform and communication tool. Training employees to locate information is far more effective than trying to teach them everything they might not recall when needed. Integrating the knowledge management system into CRM and AI tools ensures that information is always readily accessible.

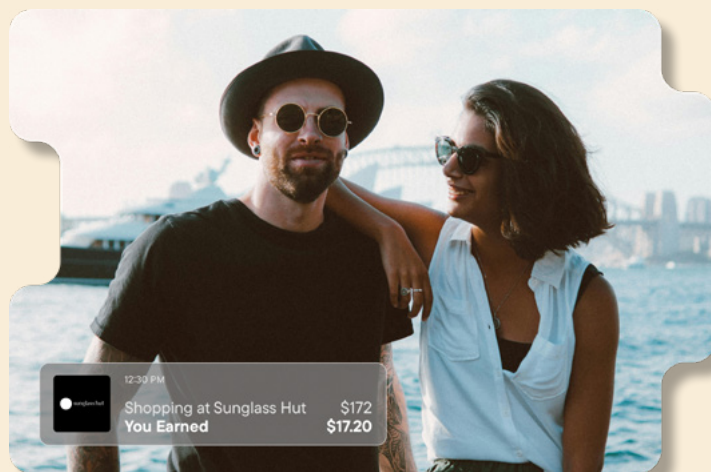
Ultimately, if our goal is to support Neo customers in a way they haven't experienced before, knowledgeable Neo specialists are the key. Utilizing technology to support our team is how we achieve this.

EITK: Can you share a project or initiative you've led at Neo that has significantly enhanced the customer experience? What were some key takeaways?

Shannon: I am proud to share that one of the most significant initiatives I've undertaken at Neo is developing the operational framework that has transformed our customer and employee experience. This framework not only enhances the operational side of the business and supports the CX team but also lays a foundation for providing invaluable feedback to our product and tech teams. Neo thrives on constant improvement, valuing direct feedback from customers as a crucial element for growth.

The success of this initiative stems from my commitment to building it systematically, aligning with the organization's growth at each stage. It might have been tempting to import a comprehensive framework from a previous organization, but I recognized that it would have been premature for Neo. My corporate experience has equipped me with insights to combine the best elements of diverse frameworks, seamlessly integrating them into the Neo operating model. This model was crafted to scale nimbly, focusing on process trust and gradual enhancement as the company evolves.

I often joke that the "Neo Experience" emerged from Google Sheets as our workforce management tool, evolving into the



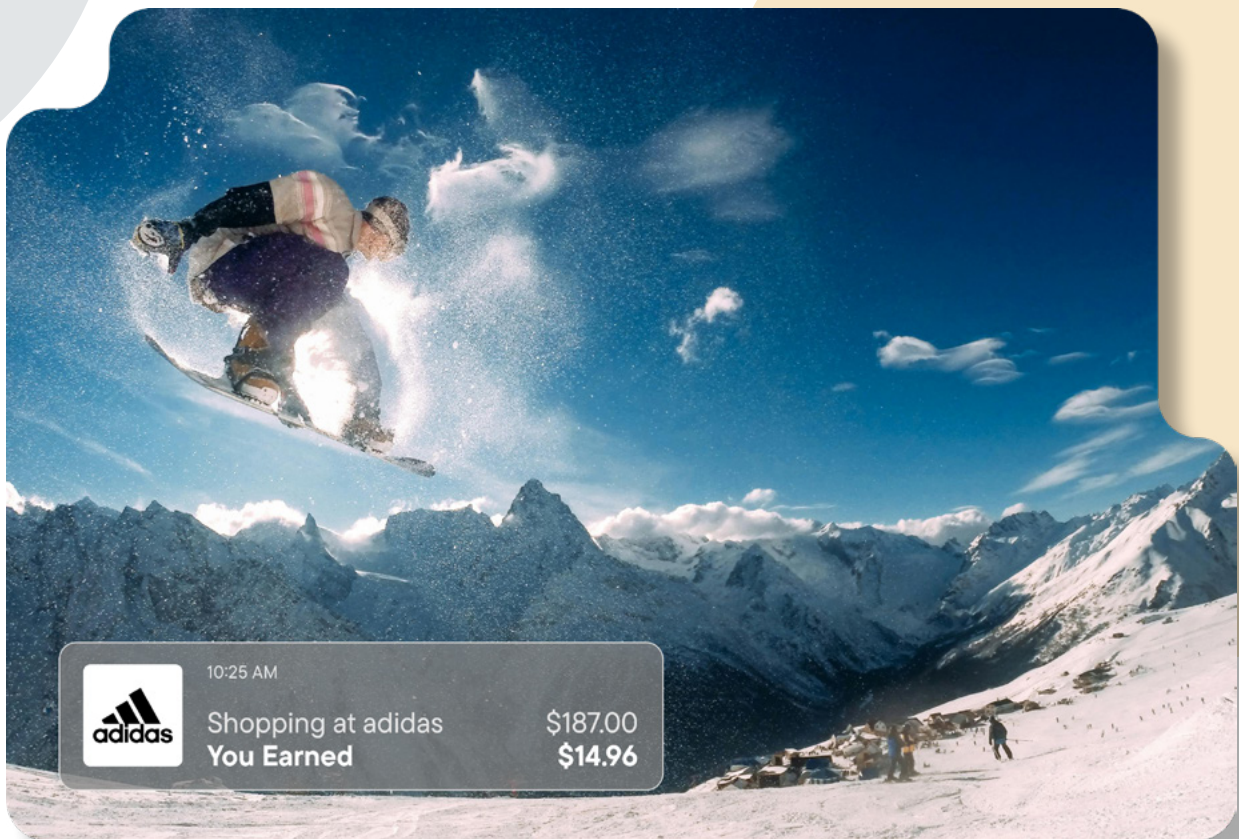
sophisticated GenAI bots and intricate tech solutions we have today.

It's amusing to reflect on how far we've come, and I'm certain that three years from now, we'll laugh at our current state, acknowledging there's always room for improvement. I'm confident that the foundation I've built will endure because it is flexible, cost-effective, revenue-generating, and consistently delivers outstanding outcomes for our customers.

EITK: You've been a champion of customer-first throughout your career. What's one lesson you've learned that you believe all customer experience leaders should embrace?

Shannon: As I reflect on my journey leading customer-facing businesses, it strikes me as humorous that the most vital lesson I've learned – and believe other leaders should adopt – isn't groundbreaking or innovative. Instead, it's simply about people. Building a network of customer advocates throughout the organization is crucial. For a long time, I underestimated this aspect and didn't fully grasp the power it holds in driving a business forward collectively.

Customer behavior can be unpredictable, resulting in customer journey data that isn't always crystal clear. This makes it easy to underestimate the impact of the experience on



the bottom line. The days when customer experience was limited to moments of human interaction are long gone. Nowadays, customer experience includes every touch point with the brand; therefore, not only the CX leaders have to be customer-focused, but all leaders need to be advocates.

That's why having a team of customer-first leaders across the organization is vital. They advocate for customer centricity and represent all the interaction points a customer has with the brand. This approach not only simplifies the process of enhancing customer experience outcomes but also helps cultivate profitable, loyal customers.

EITK: What does customer experience mean to you personally, and how do you see it evolving in the next few years at Neo Financial?

Shannon: What does customer experience mean to me? It's about the entire journey – from the first moment a customer interacts with Neo's app or website to how our products make them feel to marketing and human interactions. People have a deep emotional connection to

their money because it's integral to their lives. Engaging in financial activities can trigger varied emotions, so Neo's brand prioritizes ease and simplicity. We aim for an experience free of friction because minimizing complications enhances trust and emotional connection, making Neo's interaction seamless.

Every day, my colleagues and I at Neo are committed to refining products and processes to reduce the need for human intervention. This approach might sound peculiar coming from someone who oversees the contact center, but it actually aligns perfectly with a modern view of customer experience. Today, customer experience encompasses far more than direct human interaction – it's about the entire journey. Neo differentiates its customer experience by focusing on effortless interactions that evoke feelings of excitement through well-designed products and processes.

With the advancements in AI, Neo is increasingly capable of minimizing routine interactions. While some might see this as a threat to the role of customer experience agents, I see it

differently. The role of contact center agents is evolving to focus on complex interactions where customers need advice, financial education, or reassurance during challenging financial decisions. The Neo Experience team is pioneering the next-generation CX agent role – one that is crucial, highly valued, and well-compensated.

EITK: Finally, can you share how your involvement in Execs In The Know and the KIA Online community has created value for yourself and your organization?

Shannon: There are numerous ways that the Execs In The Know and KIA Online Community have brought value to both Neo and me, but I'll focus on three key aspects.

First, the access to like-minded individuals has been invaluable. When I'm in an environment with people who share similar goals and challenges, my creativity thrives. It's easier to solve problems and adapt successful strategies from other organizations to enhance the Neo experience.

Second, the community provides a space for reflection. It allows me to step back from daily tasks and truly consider what's happening at work. Whether through interactions with community members or utilizing KIA's online

tools, I can reevaluate situations, gaining fresh perspectives and new ideas. This environment inspires innovation and reassures me that my efforts are valuable and impactful for both employees and customers.

Finally, participating in the community gives me the chance to give back. Sharing my experiences and processes helps others be creative, solve problems, or advance their careers. I've been fortunate to have a dynamic and successful career across various industries and roles, and I believe sharing this breadth of experience is important. While not everything I share may resonate with everyone, if I can help another leader gain momentum, improve customer service, or enhance employee engagement, my time is well spent.

Consumers deserve to engage with customer-centric companies that value loyalty, and communities like Execs In the Know promote this mindset. Sharing this approach with leaders can help grow their companies' customer-centric culture, making the world a better place for consumers. I am eager to be part of a community with the power to transform customer experience globally, benefiting employees and customers and positively impacting organizations' bottom lines. ✨



Execs In The Know

Thank you to Shannon Burch for her leadership, participation, and insights.

To connect with Shannon or 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 about the KIA online community? [CLICK HERE.....](https://bit.ly/aboutkia)
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Interested in taking part in a future Brand Spotlight feature and sharing your story? [CLICK HERE.....](mailto:info@execsintheknow.com)
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Execs In The Know

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COMMUNITY SPOTLIGHT: VOICES OF CX

Powerful insights and firsthand experiences from our CX leadership community, highlighting the expertise and strategies driving innovation and success, straight from the voices shaping the future of CX.





LISA DIEHL

Director, Customer Care

HOW DO YOU ENSURE THAT HUMANITY REMAINS CENTRAL TO YOUR CX STRATEGY?

"At its core, 360 Degrees of Empathy is about creating low-effort and deeply human experiences for our consumers. 360 Degrees of Empathy will unify and strengthen our team's mission and help to ensure a consistent experience no matter what channel our Pet Parents connect with us. The four pillars include: Use Super Hearing, Find Direct Paths, Make Wise Decisions, and Don't Forget to be Human."

JOHN MCCAHAN

Vice President, Customer and Member Care

HOW ARE YOU APPLYING DATA TO ENABLE YOUR CX AND EX OBJECTIVES? WHAT CHALLENGES HAVE YOU FACED WITH DATA ALIGNMENT?

"Ensuring as a leader that the entire organization (CX, Logistics, Finance, Marketing, Data Intelligence, and Operations) are living and breathing one source of the truth. We use data in all of our decisions as well as in our testing (fail fast, fail early and fail small) approach to determine what works best for the entire business. By focusing on one source of the truth, our challenges are minimal; we trust what the data says."



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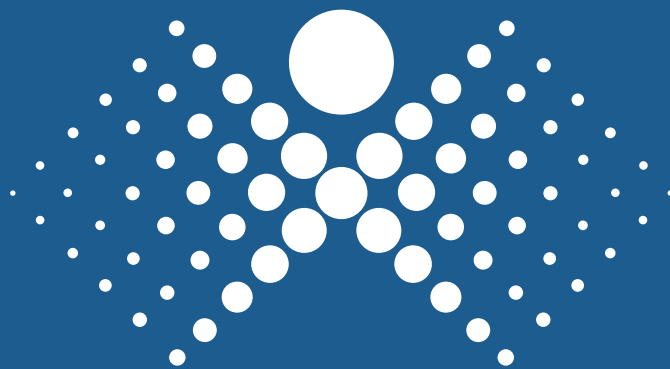


DANIELLE BENEDUCE VALENTE

Senior Director, Partner Outsourcing

WHAT ARE YOU DOING TO ENABLE AND EMPOWER YOUR AGENTS' SUCCESS AND THEIR EXPERIENCE?

"Over the last 6-8 months, we've added an entirely new team to our Care Department called People Excellence, who are focused on equipping our agents with the right tools, resources, and expectations needed to do their jobs successfully."



ExecsInTheKnow.com