



JANUARY 2025 | QUARTER 1

CX Insight

AN EXECS IN THE KNOW PUBLICATION

Lead Boldly

Exploring AI, empathy, and moments that truly matter.



AI Personalization: Customer Experience in the Digital Age

Brand Spotlight: Michael Kors

Agents of Change: How Emotional Intelligence Training Elevates CX

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CX Insight

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Welcome

to the January 2025 issue of *CX Insight* magazine, an Execs In The Know Publication.

Bold Moves, Big Opportunities

Last year, I witnessed the growing influence of artificial intelligence (AI), the critical importance of emotional intelligence (EQ), and the increasing demand for seamless, hyper-personalized customer journeys. But more than anything, 2024 reaffirmed a simple truth: customer experience is all about relationships.

As we step into 2025, the opportunities before us are vast. How can we create deeper connections with customers while leveraging the powerful technologies at our fingertips? How do we ensure every moment of truth – the make-or-break moments in a customer’s journey – builds loyalty for the long haul?

In this issue, we’re diving into the trends, innovations, and insights that will shape the future of CX. From Michael Kors’ pursuit of balancing luxury with AI to the transformative power of agent-facing EQ training, this edition offers a glimpse into how brands are redefining excellence. Our KIA Spotlight showcases Belk’s unwavering commitment to “wow” moments, while our feature on AI-driven personalization reminds us that the future of CX is as much about trust as it is about technology.

The articles you’ll find here aren’t just about ideas – they’re about action. Whether it’s reimagining the role of AI in your strategy, leveraging journey maps to improve customer touch points, or leading with empathy in every interaction, the stories we share aim to inspire.

So, as you flip through these pages, I encourage you to think about one question: How will you lead in 2025?

Here’s to a year of connection, innovation, and unforgettable customer experiences.

Elysia McMahan

Director of Content

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AI Personalization: Customer Experience in the Digital Age

In a world of limitless options, AI personalization simplifies decision-making by delivering the right content, support, or product customers need, when they need it.

by Execs In The Know



Imagine visiting an online store where every product is curated just for you – tailored to your tastes, preferences, and current needs. No endless scrolling, no decision fatigue. Just seamless, intuitive experiences that make you think: *They really know me*. This isn't a dream scenario – it's the reality being ushered in by artificial intelligence (AI) personalization. It's about delivering experiences that feel human and deeply relevant.

For CX leaders, AI is unlocking the ability to deliver hyper-personalized, one-to-one experiences at scale – not in months, but in days or even hours. The possibilities go far beyond improving efficiency or driving revenue; they're about building connections that make customers feel valued and understood. But, with these opportunities come critical challenges: How do you strike the balance between personalization and privacy? How do you harness AI without sacrificing the human touch that customers still crave?

Success requires more than algorithms. It requires vision. It requires trust. And it requires a commitment to keeping the customer at the center of every decision. This article explores the evolution, opportunities, and future of AI-driven personalization and how CX leaders can wield this technology to not just serve, but truly delight their customers.

The Evolution of Personalization

Personalization isn't new. It's evolved from static segmentation – grouping customers based on generic demographics or purchase history – to dynamic, AI-driven insights that operate in real time. Remember the days of mass-marketing emails with blanket discounts? Customers do, and they expect better. According to [Harvard Business Review](#),¹ more than 80 percent of respondents in a BCG survey of 5,000 global consumers say they want and expect personalized experiences. Personalization will be the most exciting and most profitable outcome of the emerging AI boom.

Advancements in AI technologies like machine learning (ML), generative AI (GenAI), and predictive analytics are making it possible to analyze massive datasets in moments. AI doesn't just see what customers are doing – it interprets why, anticipating needs before they arise.

This is personalization and sophistication that static methods could never deliver. It's dynamic content on websites, predictive recommendations on e-commerce platforms, and tailored support in customer service. And it's not just about relevance – it's about solving the problem of too much choice.

The digital era has brought limitless options: endless product listings, thousands of streaming choices, and countless notifications vying for attention. AI-powered personalization cuts through this noise, helping customers make decisions they'll feel confident about. For brands, this translates to increased satisfaction, reduced cart abandonment, and repeat engagement.

How AI Personalization Works

AI-driven personalization combines ML, natural language processing (NLP), and GenAI to deliver tailored experiences at scale. The process starts by collecting customer data – like user behavior,



preferences, and interactions – along with contextual signals such as location, time of day, and device type. Often, this involves blending internal organizational data with third-party datasets for a more comprehensive view.

AI algorithms then analyze this data, identifying trends, patterns, and audience segments based on shared behaviors and characteristics. From there, the AI recommends products, services, or content that align with user preferences and demographics, even dynamically displaying personalized website or app content to different users.

Over time, as the AI learns and adapts from user interactions, it continuously refines its recommendations, optimizing the personalization process to feel smarter, faster, and more human. GenAI takes this a step further, enabling businesses to deliver predictive personalization – anticipating needs before customers even express them.

Picture this:

- A chatbot that doesn't just answer queries, but anticipates the next question.
- A homepage that adapts dynamically as users scroll.
- Pricing that adjusts in real time, optimized for demand and customer loyalty.

The result? Personalized product suggestions, dynamic website content, and hyper-relevant marketing campaigns that feel authentic, not automated.

From Retail to Streaming: How AI Delivers Tailored Experiences

AI-powered personalization isn't hypothetical; leading brands are already making it happen across industries.

Retail & E-Commerce

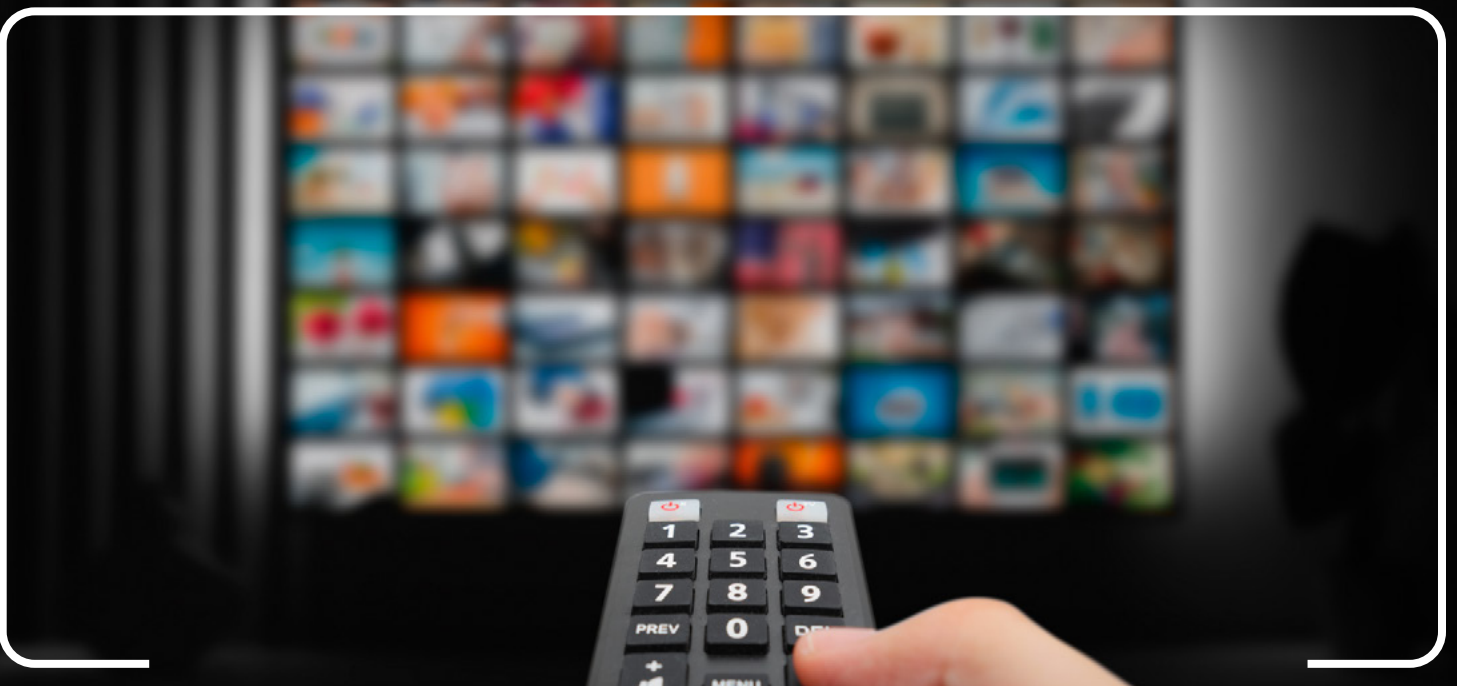
Companies like Amazon and Walmart leverage predictive recommendation engines² to suggest products customers didn't even know they wanted. Starbucks uses ML³ to suggest drinks based on time of day, weather, and purchase history, seamlessly integrating predictions into its inventory management.

These engines consider browsing history, prior purchases, and real-time behavior to surface highly relevant options, boosting both sales and customer satisfaction.

Streaming Platforms

Spotify is a master of AI-driven personalization. The audio streaming and media service provider leverages AI and ML⁴ to apply personalization capabilities, leading to the features, playlists, and experiences Spotify users have come to know and love. By combining collaborative filtering, NLP, and audio models, Spotify creates tailored playlists like *Discover Weekly* and *Release Radar*. This not only enhances user satisfaction and loyalty, but also boosts artist exposure to new audiences. As the system processes more data, its accuracy and effectiveness continue to improve.

Netflix owes much of its success to its sophisticated use of AI for personalized content recommendations. By tracking what users watch, how long they watch it, and whether they finish it, Netflix identifies preferences like favorite genres, themes, and actors. The AI analyzes these insights alongside factors such as popularity, user ratings, and viewing habits of similar users to create custom recommendations.



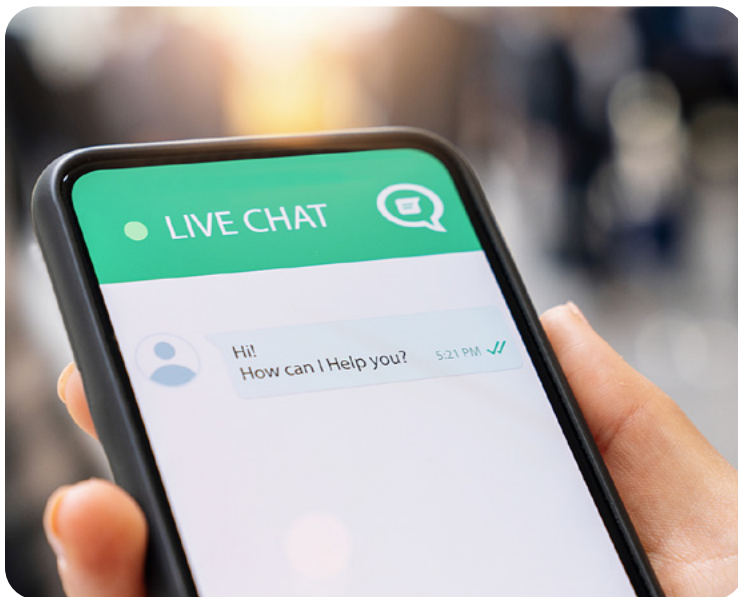
Powered by advanced ML algorithms, Netflix's system continuously learns and adapts, spotting patterns that humans might miss, and refining suggestions with every choice they make. This ever-improving personalization is a key reason why Netflix remains a fan favorite.

Customer Support

AI tools like chatbots and virtual assistants now provide instant, personalized support by anticipating customer questions and offering relevant solutions. This frees human agents to handle complex, high-value issues.

How much are you leaving on the table by not optimizing your recommendations, content, or support experiences with AI? For companies prioritizing personalization, the business impact is undeniable. IBM research shows that CEOs leading CX-focused organizations see three times the revenue growth of their peers.⁵

But, here's the rub: Personalization can't come at the cost of trust. Consumers want relevant experiences, but they're also wary of how their data is used. Brands that prioritize transparency, ethical data practices, and clear value creation will stand out. It's a balancing act, and the stakes are high – because once trust is lost, it's hard to win back.



Start with the problem you want to solve – not the tech you want to buy.

Challenges and Ethical Considerations

For all its promise, AI-driven personalization isn't without its hurdles.

Balancing Personalization with Privacy

Collecting customer data to deliver tailored experiences is critical, but it also raises concerns around privacy and trust. Regional regulations like the EU's GDPR and California's CCPA make it clear: companies must prioritize transparency, security,⁶ and consent. Apple, for example, has differentiated itself by championing privacy as a core brand value – and customers notice.

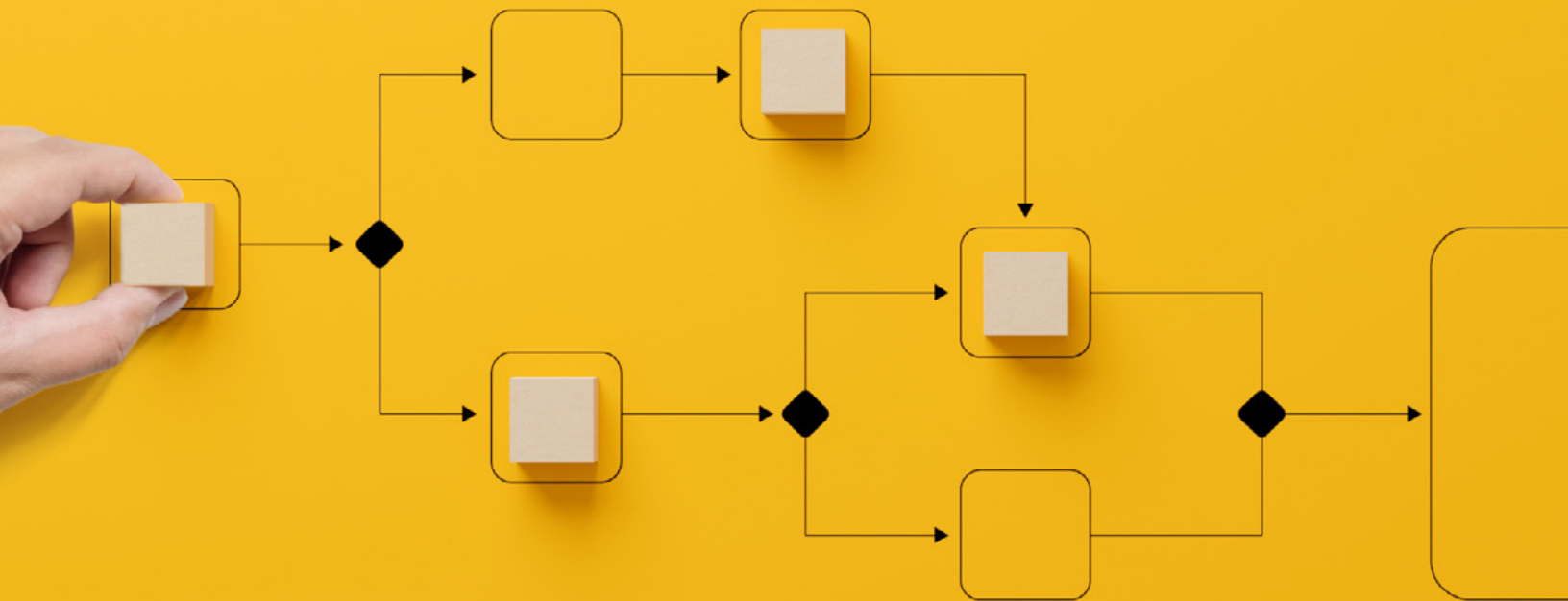
For CX leaders, the challenge is clear: How do you ensure personalization doesn't feel intrusive? The answer lies in ethical AI practices – being transparent about data collection, offering customers control over their preferences, and prioritizing security.

Avoiding Algorithmic Pitfalls

AI isn't infallible. Over-reliance on algorithms without human oversight can lead to tone-deaf interactions. For example, a customer who recently bought a car doesn't need ads for car loans the following week. AI needs constant tuning and context – and this is where human input remains irreplaceable.

Tech vs. Outcomes

The technology itself isn't the endgame. The goal is outcomes: improved engagement,



satisfied customers, and measurable business growth. Yet, many organizations fall into the trap of focusing on AI tools without aligning them to tangible goals.

Before investing in any AI solution, ask: What outcomes will this drive? Start with the problem you want to solve – not the tech you want to buy.

Benefits That Extend Beyond the Customer

Personalization doesn't just benefit your customers – it's a competitive edge that reshapes the way businesses operate, driving efficiency, revenue, and smarter use of resources. By tailoring every interaction, brands are creating dynamic engagement that keeps customers connected longer, encourages exploration, and accelerates conversions. When recommendations hit the mark, clicks turn into sales – and often into repeat purchases, boosting long-term value.

The benefits extend behind the scenes, too. AI-driven personalization brings cost efficiency by automating content creation, marketing, and customer service interactions, with some studies showing that it can cut acquisition costs by up to 50 percent.⁷

Real-time, data-driven insights fuel agility, helping businesses forecast behaviors, iterate faster, and focus their efforts where they matter most. It's not just about delivering relevance to the customer – it's about unlocking smarter, leaner, and more impactful growth.

Best Practices

So, how do you ensure AI personalization delivers both impact and scalability? It starts with strong data foundations—AI is only as effective as the quality of the data it runs on. Clean, integrated, and well-leveraged internal and third-party data provide the solid groundwork AI needs to perform reliably. From there, it's about striking the right balance



between personalization and privacy. Customers value relevance, but they also value trust. Transparency in how data is used, paired with a commitment to privacy and security, builds confidence and reduces the risk of overstepping.

To keep AI aligned with real-world behaviors, leaders are prioritizing models that can learn and adapt. Continuous updates and retraining ensure AI evolves alongside customer needs, maintaining both accuracy and effectiveness. But personalization isn't valuable on its own – it needs to drive measurable outcomes. Whether it's boosting business growth, strengthening customer loyalty, or improving internal efficiency, every effort must tie back to broader organizational goals.

Finally, scaling AI personalization requires ongoing measurement and iteration. Success often looks different across audience segments, making it essential to assess results, refine

strategies, and adapt approaches to maximize impact. It's a cycle of learning, improving, and delivering value at scale.

The Future of Personalization

So, where is AI personalization heading next? If today's personalization feels impressive, the future is even more dynamic. Hyper-personalization – AI that adapts to individual users in real time – is redefining what's possible. It moves beyond segmentation to deliver experiences that feel genuinely one-to-one.

Think about a customer navigating a brand's website. With AI, every click changes the recommendations they see. The homepage reshuffles itself to prioritize the products most likely to convert that user. The messaging adapts, too, offering dynamic discounts or nudges tailored to their behavior. Hyper-personalization doesn't just meet customers where they are; it anticipates where they're going.

As AI evolves, so will the ways it delivers personalization.

GenAI for Content: AI is now creating tailored marketing content, ads, and even creative assets based on user behavior.

Predictive Personalization: AI forecasts customer needs before they're expressed, like Starbucks recommending drinks based on weather patterns.

Talent Transformation: AI personalization isn't just external – it's internal, too. From tailored training programs to virtual assistants supporting employees, personalization drives better outcomes across the organization.

Multimodal AI: AI Combines text, image, voice, and video data to deliver seamless, cross-channel personalization. Imagine a customer starts a query via chatbot, continues via voice assistant, and finishes with an in-store visit – and the experience feels consistent and personal throughout.

Emotional AI: AI tools will soon interpret emotional cues like tone, facial expressions, or sentiment to tailor responses in real time. A frustrated customer receives empathy and fast-tracked solutions, while a satisfied one receives relevant upsell opportunities.

Scalable 1:1 Personalization: GenAI is bringing us closer to true hyper-personalization at scale. Marketing campaigns that once took months to roll out can now be launched in days with dynamic, tailored content for every segment.

Cross-Channel Consistency: Customers don't think in silos – and neither should your personalization strategy. AI tools will enable brands to deliver consistent, unified experiences across all touch points: web, email, app, and in-person.

Are We Making Personalization Personal Enough?

AI-powered personalization isn't just the future – it's already transforming how businesses connect with customers, and for CX leaders, the opportunity is immense. Success starts with a customer-first mindset, prioritizing outcomes that drive satisfaction over chasing the latest shiny tech. It's about balancing AI and humanity: using AI to handle repetitive tasks so teams can focus on high-impact, human-centered work.

Ultimately, AI-powered personalization allows us to meet customers where they are in order to anticipate their needs, reduce frustration, and deepen loyalty. As you consider your next steps, ask yourself: *Are we making personalization personal enough?* Now's the time to harness the power of AI and show your customers that you see them, hear them, and truly understand them. Because when customers feel valued, businesses don't just win—they grow. ✨

Links:

1. <https://hbr.org/2024/11/personalization-done-right>
2. https://tech.walmart.com/content/walmart-global-tech/en_us/blog/post/walmarts-generative-ai-search-puts-more-time-back-in-customers-hands.html
3. <https://news.microsoft.com/source/features/digital-transformation/starbucks-turns-to-technology-to-brew-up-a-more-personal-connection-with-its-customers/>
4. <https://newsroom.spotify.com/2023-10-18/how-spotify-uses-design-to-make-personalization-features-delightful/>
5. <https://www.ibm.com/think/topics/ai-personalization>
6. https://execsintheknow.com/wp-content/uploads/2024/09/State-of-the-Tech_AI-in-the-Contact-Center_September-2024.pdf#page=30
7. <https://www.ibm.com/think/topics/ai-personalization>





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Agents of Change: How Emotional Intelligence Training Elevates CX

By combining AI's precision with human empathy, organizations can empower agents to resolve challenges effectively, fostering deeper customer relationships, improving employee satisfaction, and enhancing brand loyalty.

by Execs In The Know

The pace of change in today's workplace is staggering. Market conditions shift, and technology advances seemingly overnight. Artificial intelligence (AI) transforms frontline contact center agents' operations, streamlining routine tasks while redefining what it means to deliver exceptional customer care. Here's the key shift: As AI takes on transactional, repeatable interactions, agents are stepping in to resolve the most complex, emotionally charged challenges, where a human touch is not just preferred but essential.

This is where emotional intelligence (EI) comes in. When human empathy intersects with AI's capabilities, organizations are uniquely positioned to turn high-stakes moments into brand-defining opportunities.

The AI Handoff

AI can work like a charm to deliver well-executed transactions that are routine, data-driven, and require speed and efficiency. For example, AI is consistently effective at answering repetitive questions, offering simple transaction assistance, and making recommendations to help customers. However, it can struggle with complex, emotionally charged, and ambiguous interactions, mainly when the customer need is nuanced and requires a high level of trust.

For these types of contacts, customers need well-trained human agents who exhibit high EI to handle complicated interactions. The most crucial application of human touch is an emotionally charged interaction. These contacts often represent moments of truth in a customer's relationship with the brand, and how a company handles these interactions can strongly influence customer satisfaction, loyalty, and reputation. Agents with strong EI can identify customer emotions and provide genuinely empathetic responses that build trust and rapport in stressful and/or sensitive scenarios.

Arguably, the most critical outcome of EI training is mastering ways to de-escalate emotionally charged interactions with active listening and empathy. Live agents with strong EI skills are the best choice to defuse tension, anger, or frustration. For example, a customer who waited weeks for a previously back ordered item that arrived damaged, a refund denial because of a policy dispute or a repeat contact about an ongoing billing issue most likely requires a human-to-human interaction to de-escalate the negative emotions and resolve the problem effectively.

In addition to using EI skills to humanize the customer experience (CX) with a personal touch that ensures customers feel heard and valued, agents can customize the interaction and make the most of the contact. Strong EI skills empower agents to tailor responses and solutions specifically based on the unique emotional and situational context, taking interaction personalization to the next level and driving upsells and retention. By recognizing when a customer is satisfied or engaged, agents can suggest complementary products that feel natural and personalized. Similarly, detecting frustration allows support team members to proactively offer solutions, turning potentially negative experiences into opportunities for strengthening loyalty.¹



The AI/EI Partnership In Training

Elevating agent performance and emotional intelligence through advanced training simulators.

Companies that form strong partnerships between AI and EI can help improve agent knowledge and performance. AI can provide agents with on-the-spot tools to assist them, including real-time insights, sentiment analysis, and suggested next-best actions. Agents with high EI can take this AI-provided sentiment and feedback to alter their communication style during an interaction. By marrying AI insights with their EI, agents can adapt dynamically to customer needs, creating a valuable blend of technology-driven precision with human empathy. This helps resolve issues effectively while building (or rebuilding) trust and loyalty.

AI can supercharge training by creating an environment for agents to interact with virtual customers. AI simulations mimic customer interactions and agent responses in a controlled, safe space, sharing real-time feedback. They respond to agent input dynamically to improve several skills, including voice tone, critical thinking, and problem-solving. The simulations are adaptive and realistic and include varying levels of complexity and EI-building scenarios.

When AI training simulators are focused on developing and improving agent EI, they can address several CX scenarios and deliver unique benefits for each. The following table highlights some key uses and benefits of this powerful AI/EI combination.

Scenario	How Simulators Help	Example
Identifying and responding to highly emotional situations	<ul style="list-style-type: none"> • Simulators mimic emotionally charged customer interactions, such as angry complaints, confused queries, or urgent requests. • Agents learn to recognize emotional cues, such as tone, language, and behavior, in a safe, controlled environment. 	An agent practices de-escalating a scenario where a virtual customer expresses frustration over the delayed delivery of an urgently anticipated package.
Developing empathy	<ul style="list-style-type: none"> • Simulators often include diverse customer personas, each with unique emotional states and needs. • Agents practice putting themselves in the customer’s shoes and responding empathetically to concerns. 	An agent interacts with a simulator portraying a distressed parent trying to resolve an issue with a product for their child.
Strengthening active listening skills	<ul style="list-style-type: none"> • Simulators require agents to actively listen and respond based on subtle emotional cues or details provided by virtual customers. • Agents hone their ability to pick up on unspoken emotions and underlying concerns. 	The simulator adjusts the customer’s tone or sentiment based on the agent’s responses, reinforcing the importance of actively listening.
Enhancing emotional regulation	<ul style="list-style-type: none"> • Simulators present high-stress scenarios, helping agents practice staying calm, composed, and professional. • Agents learn techniques to manage their own emotions while dealing with difficult customers. 	An agent practices switching from a formal to a friendly tone to match the virtual customer’s mood or picks up the pace of a conversation to sync with the customer.
Mirroring	<ul style="list-style-type: none"> • Simulators provide feedback on how well the agent’s communication style matches the customer’s emotional needs. • Agents learn to adjust their tone, phrasing, and approach to suit different personalities and situations. 	An agent practices switching from a formal to a friendly tone to match the virtual customer’s mood or picks up the pace of a conversation to sync with the customer.

Partner Commentary

Emotional intelligence has been a hotly debated topic over recent years. At what point does EQ supersede IQ as important in the CX landscape? Or does it? Customer surveys have continued to confirm that competence over kindness is a customer preference by a 2 to 1 margin. The reason for that is simple: the customer wants their concern resolved swiftly because they are busy. Time spent with a customer service representative is time away from work, family, and other obligations. So, why is EQ important? Because EQ drives everything about customer connection.

EQ is critical because people remember how they feel when doing business with a brand. That feeling primarily comes from human connection, especially when there is a service issue or need. Every interaction customers have with a brand either cements loyalty or eliminates it. This is where EQ matters. EQ is driven by connection, understanding, empathy, and active listening. These skills are not inherently known or practiced. So, can they be learned in the CX space? Of course, they can! How can they be learned? The formula is simple: Learn + Apply = Mastery. Traditional training is ancient history. Seventy percent of what humans learn is through practical application or experience. Hands-on learning is the only proven way to deliver high levels of EQ in the CX world.

Real-life-based simulation practice has become largely adopted by top brands over the past five years, as leaders have come to the realization that there is a financial liability and negative brand impact when excellent customer experiences are not delivered and delivered consistently. Practice is essential for learning. The practice of EQ has to be presented in life-like scenarios, which AI Conversation Simulation has delivered. Customer service reps who practice with AI Simulation become competent 20-70 percent faster, gaining the confidence they need to deliver an effective, EQ-positive customer experience. The formula is simple. The technology companies supporting its implementation into reality are revolutionary and are helping many leading brands deliver this level of excellence that incorporates a heavy dose of EQ.

Casey Denby
 Vice President, Strategic
 Accounts & Partnerships



In addition to practicing behaviors in response to virtual customer needs, simulators can build confidence and strengthen agent EI through skill-building repetition. Repeated exposure to various scenarios builds muscle memory for handling emotional situations, improving self-awareness and confidence in handling real-life interactions with EI-forward responses. Finally, simulators often include AI-driven analytics and coaching, which deliver real-time feedback on the agent's performance. This allows agents to reflect on their practice interactions, identifying areas for improvement in emotional awareness, empathy, and other soft skills.

AI, EI, and the Employee Experience

AI simulators help strengthen agent EI skills in a safe environment, providing them a challenging yet comfortable experience. Adopting EI fosters a positive, supportive, and emotionally aware workplace culture and is critical to a world-class employee experience. EI is increasingly and urgently recognized as a competitive advantage for companies that want to cultivate a [purpose-driven workforce for the future](#).² When EI is part of the corporate culture, work environments benefit from improved interpersonal dynamics, increased personal growth, and enhanced communications.

Organizations also see improvements in team and employee adaptability, empowerment, and risk tolerance. Today's customer service organizations are more dynamic than ever; they constantly evolve to deliver new strategic initiatives, meet changing expectations, and adjust to using emerging technologies, such as critically important AI initiatives. Employees must have the aptitude and attitude to understand the impact of innovations like AI-powered chatbots and virtual assistants on their jobs.

Specifically, strong EI skills can help reduce employee fear and resistance to change as AI initiatives expand. Employees may feel intimidated or threatened by AI, fearing it will replace their roles or create new complexities.



However, EI can help:

- Self-aware employees can better recognize and manage their emotional responses to AI adoption.
- Strong communication skills can help overcome misinterpretations or a lack of understanding about AI's purpose, avoiding confusion and resistance.
- Teams with high EI can express concerns or ideas about AI implementation openly and respectfully, fostering collaboration.
- Critical-thinking skills help agents approach AI with curiosity and a balanced perspective. They seek to understand its benefits, limitations, and impact on their work.
- Leaders can use EI to build trust by explaining AI initiatives transparently and addressing concerns with care and understanding.

By developing employees' abilities to understand and manage emotions – both their own and others – organizations can expect various benefits that positively impact morale, engagement, and

EI vs. EQ: What's the Difference?

Emotional intelligence (EI) includes various skills and competencies that help individuals understanding emotions and manage responses. Emotional quotient (EQ) is applied to a measurement of score that qualifies someone's emotional intelligence. Think of as the concept, and EQ as a way to access EI and qualify that concept.⁴

productivity. High EI helps agents manage stress, stay motivated, and maintain a positive mindset, improving job performance and satisfaction. Agent retention is always essential, and agents who enhance their skills and deliver better customer experiences may feel more satisfied and stay longer.³

Lastly, and likely most important, EI positively impacts mental health. It equips employees with skills to understand better, manage, and regulate emotions, which can result in agent well-being, resilience, and overall psychological health.


Developing and applying EI skills benefits individuals at work and in many other aspects of their lives. EI enhances well-being, builds resilience, and fosters stronger personal relationships. It also empowers people to gain valuable insights into themselves and others, ultimately promoting long-term success and more meaningful connections across all areas of life.

Why AI and EI Are Better Together

AI's value is clear. It enables faster, more efficient resolution of routine tasks, frees up agents to focus on high-impact moments, and delivers tools that make agents better at what they do. But, here's the truth: AI alone can't build trust. It can't nurture relationships. And it certainly can't turn frustrated customers into lifelong advocates.

That's where emotionally intelligent agents come in. By combining the precision of AI with the power of human empathy, organizations can:

- Deliver personalized, meaningful customer experiences.
- Build stronger, longer-lasting customer relationships.
- Create workplaces where agents feel supported, empowered, and fulfilled.

The future of CX isn't about choosing between AI and EI. It's about leveraging both. Because when machines and humans work together, everyone benefits – the customer, the employee, and the brand. And that's a future worth investing in. 

Links:

1. <https://www.cmswire.com/customer-experience/emotion-is-the-new-metric-the-rise-of-sentiment-analysis-in-retail/>
2. <https://hbr.org/sponsored/2019/08/the-ei-advantage-driving-innovation-and-business-success-through-the-power-of-emotional-intelligence>
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CERTIFICATION PROGRAM FOUNDATIONS IN AI FOR CX



APRIL 23-25, 2025



Minneapolis, MN

ENROLL NOW



Execs In The Know



CERTIFICATION PROGRAM

With the rapid advancement of CX technology, it is more important than ever for senior leaders to be confident in their knowledge about AI. This course equips leaders with an understanding of AI's integral role in CX, the operational dependencies critical to success, and the opportunities to make a positive impact on the customer and employee experiences.

CERTIFICATION PROGRAM BENEFITS

- Gain actionable insights to enhance AI strategies.
- Improve CSAT, profitability, and stakeholder engagement.
- Mitigate risks associated with AI implementations.
- Equip teams with essential knowledge to drive AI success.
- And more.

CURRICULUM HIGHLIGHTS

Digital CX Strategy and AI Fundamentals

- Align AI strategies with business objectives.
- Measure ROI and gain stakeholder support.
- Plan for AI's impact on roles.

Conversational AI Ethics

- Understand the legal and ethical implications of AI.
- Apply FAST (Fairness, Accountability, Sustainability, Transparency) principles.
- Address and prevent ethical dilemmas in AI workflows.

Ensuring AI Response Quality

- Define AI quality requirements to meet business goals.
- Implement best practices for AI design and performance management.
- Maintain high-quality AI interactions in real-time.

Knowledge Management for AI

- Ensure proper data governance and organizational readiness for AI.
- Prepare and manage knowledge content for AI use.
- Maximize AI benefits while minimizing data and content risks.



The curriculum was well-designed and incredibly relevant to CX leaders. It provided me with actionable strategies to bring back to my team.



Kelly Fifarek

Senior Vice President of Operations

Corpay[^]



Learn More



Execs In The Know

CX Journey Mapping: Unlocking Moments of Truth

Customer expectations have never been more complex. Today's customers are navigating a winding road of touchpoints – from scrolling social media and reading online reviews to interacting with chatbots and showing up in-store. Each touch point is an opportunity to build loyalty – or break it.

by Execs In The Know

Customer expectations today are relentless. They're not simply asking for better experiences; they're demanding seamless, intuitive, human-centered interactions that surprise and delight at every turn.

In this environment, knowing your customers isn't enough. You need to understand their journeys – every high, every low, every moment of truth where they decide whether to stay loyal or quietly disappear. Customer journey mapping is your compass for navigating those pivotal moments and, when done right, it doesn't just identify problems – it transforms them into opportunities for growth.

Yet, journey mapping has an image problem. According to a recent Gartner [study](#),¹ 83 percent of customer experience professionals report that their organizations have struggled to use customer journey maps to advance their CX improvement efforts.

Journey mapping is about unlocking actionable insights that allow you to design better processes, optimize technology investments and, most important, deliver the experiences your customers expect.



Customer Journey vs. Buyer Journey

While the terms “customer journey” and “buyer journey” are often used interchangeably, they capture distinct phases of the consumer experience. The buyer journey refers specifically to an individual's path to becoming a customer. It begins the moment they identify a problem or need and ends when they make a purchase decision.

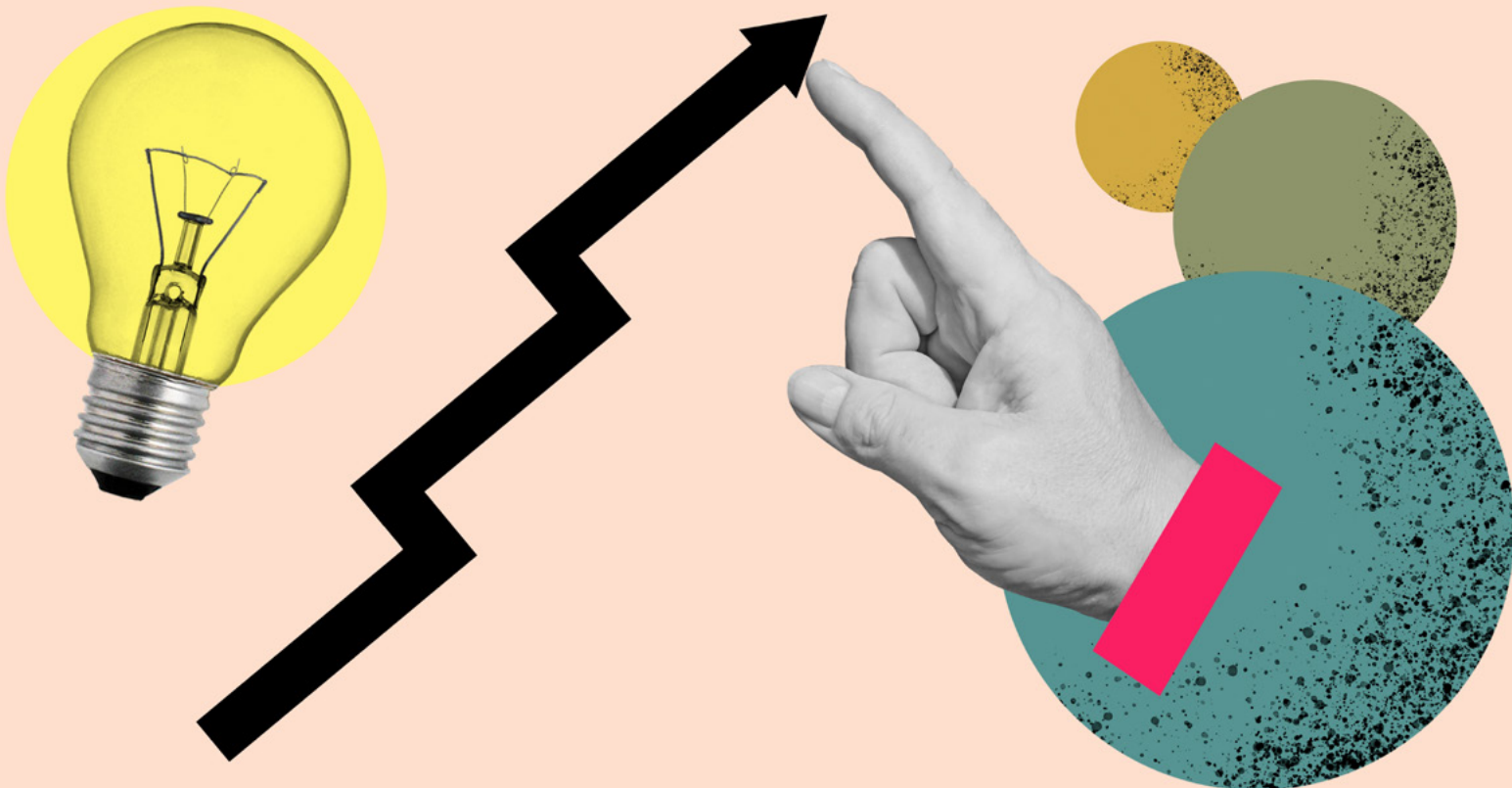
The customer journey, on the other hand, encompasses the entire relationship a consumer has with a company, from pre-purchase exploration to post-purchase interactions. In essence, the customer journey includes the buyer journey, but extends far beyond, capturing every touch point and experience that builds – or erodes – long-term loyalty.

Why CX Journey Mapping Matters

Today's customers are navigating a winding road of touchpoints—from scrolling social media and reading online reviews to interacting with chatbots, and showing up in-store. Each touchpoint is an opportunity to build loyalty or break it. And they expect more than ever: speed, personalization, and seamless transitions across every interaction.

Imagine this: You've invested heavily in a sleek, AI-powered chatbot to streamline customer service. On paper, it's a game-changer. In reality, complaint volumes spike. Resolution times lag. Customers are frustrated. Why? Because somewhere along the journey, you overlooked a critical touch point where the human touch was irreplaceable.

Journey mapping provides clarity on how to avoid these costly missteps. It's your diagnostic



tool – a holistic view of what customers do, feel, and where their journey breaks down. It brings the customer's perspective to the forefront, helping you move from assumptions to data-backed truths. It's a way to ensure you're not just solving the wrong problems faster, but solving the right ones better.

But, let's go deeper: Why does journey mapping matter? Because it uncovers your moments of truth.

Identifying Moments of Truth

Jan Carlzon, former CEO of SAS Airlines, nailed it when he coined the term "moments of truth." These brief but powerful interactions make or break a customer's perception of your brand. These moments aren't always grand. Sometimes, they're as small as an empathetic customer service call, a one-click return process, or an unexpected thank you email. These are the instances that leave lasting impressions – positive or negative. Are you identifying and investing in those moments or are they slipping through the cracks?

Identifying moments of truth requires both art and science. It's about listening to your customers, analyzing data, and connecting the dots to pinpoint where emotions run high and decisions are made. Take retail, for example: A customer browsing an e-commerce site might encounter a seamless product recommendation that feels tailor-made for them – a positive moment of truth that drives loyalty and sales. On the flip side, if their checkout process is slow or glitchy, that same moment becomes a frustration that pushes them to abandon the cart.

In financial services, moments of truth often happen during critical life events: applying for a

mortgage or navigating unexpected fees. A responsive, empathetic customer service call during these moments can make all the difference in retaining a customer for the long haul. In the healthcare industry, something as simple as clear, compassionate communication about test results can define a patient's entire experience with a provider.

These examples highlight a key lesson: moments of truth aren't universal. They vary across industries, customers, and journeys.

The Role of Journey Mapping in Modern CX

Journey mapping is more than a visualization exercise – it's a strategic tool for unlocking meaningful change. Think of it as an x-ray for your customer's experience, revealing where friction exists – whether it's an unintuitive app, a clunky checkout process, or long wait times in your contact center. But journey mapping doesn't just diagnose problems; it highlights opportunities to engineer joy and create those unforgettable peaks that elevate an average experience to something memorable.



Too often, businesses approach journey mapping as a problem-finding exercise, focused solely on fixing frustration. While addressing friction points is essential, the real magic happens when you go beyond repair to design delight. Are you focusing on the potholes or the peaks? Journey mapping uncovers both, empowering you to turn frustrations into satisfaction and moments of monotony into unexpected delight.

And here's the key: journey maps should be living, breathing tools. They don't belong in a folder or on a shelf; they should drive every strategic discussion across your organization, aligning teams and inspiring action. When done right, journey mapping doesn't just eliminate frustration, it transforms the entire experience. It bridges the gap between operational inefficiencies and the human stories behind them – ensuring every investment you make improves the customer experience where it matters most.

What to Include in a Customer Journey Map

A great [customer journey map](#)² is a story that reveals what customers are doing, feeling, and experiencing at every turn. To make it actionable, you can focus on these five essential elements:

1. Journey Stages

Break up the journey into clear steps to uncover what your customers need and how they feel at each moment. While stages may differ by company, they often include awareness, consideration, decision, retention, and advocacy. Each stage is a new chapter in understanding your buyer's mindset and goals.

2. Touch Points

Touch points are where your customers interact with your brand – online, offline, and everywhere in between. These moments shape perceptions and provide opportunities to elevate the experience. Every touch point matters because it's a chance to earn trust, reduce friction, or delight the customer.

Examples include:

- Advertisements
- Websites and social media
- Live chats and phone calls
- Emails
- In-store interactions

3. Organizational Departments

Mapping the journey also means knowing who's responsible for what. Identify which teams own each stage and what they need to do to keep customers moving forward. For example, marketing might own the awareness stage, focusing on ads or posts to guide a customer toward discovery. Not every department touches every phase, but all should understand the customer's experience across the board.



4. Opportunities and Pain Points

Pain points are moments that frustrate customers. Whether it's a problem that drove them to your company or an issue they encounter while working with you these moments are gold. Why? They reveal opportunities for improvement and growth.

5. Customer Actions and Emotions

This is where the journey map gets real. What actions are customers taking, and how are they feeling at each stage? Excitement? Confusion? Frustration? These insights show what leads to churn, what resolves issues, and what drives success.

In the end, a customer journey map is a tool to connect the dots. It helps you see where customers stumble, where they soar, and where you can show up better to make every moment count.

Best Practices

Most journey mapping efforts fail because they treat the map as the end result instead of the beginning of meaningful change.

You can focus on these best practices to level up your journey mapping efforts.

Start with Purpose

Before you map a single touch point, ask: What problem are we trying to solve? Is it reducing churn? Improving first-contact resolution? Streamlining onboarding? Starting with a clear goal ensures your map stays actionable.

Frame the Journey from the Customer's Perspective

This sounds obvious, but it's often overlooked. Journey maps aren't process maps. They should not reflect your internal workflows, but capture the customer's experience. Consider what your customers see, think, and feel at every journey stage.



Marry Qualitative and Quantitative Insights

Traditional journey mapping relies heavily on qualitative data like customer interviews and surveys. While valuable, these insights are subjective and often limited in scale. Integrating quantitative data – purchase history, website analytics, and call center metrics – gives you a more holistic view of the customer journey.

AI is a game-changer here. Large language models (LLMs) can analyze vast amounts of qualitative data – customer calls, reviews, and emails – to uncover emotional patterns and hidden pain points. Combine this with your quantitative data, and you have a robust foundation for action.

Identify Connections Across Journeys

Customer journeys rarely exist in isolation. Your customer's path might start with an Instagram ad, move to a website, involve an email exchange, and culminate in a phone call. Each interaction is a thread in a larger tapestry. Connecting journeys across channels creates a journey atlas that reveals opportunities for improvement and innovation.

Get Stakeholder Buy-In

Your CX team can't fix the journey alone. Fundamental transformation requires buy-in across marketing, sales, IT, and frontline teams. Build alignment by sharing real customer stories – nothing sparks action like hearing directly from frustrated or delighted customers.

Investing in the Right Technologies

Investing in CX technology can feel like shooting in the dark for many organizations. With so many tools on the market – AI chatbots, CRM systems, journey orchestration platforms – it's easy to get caught up in the hype. But, technology without



strategy is a recipe for wasted resources and underwhelming results.

Journey mapping brings focus to your technology investments. Identifying your moments of truth shows you where technology can have the greatest impact – whether automating repetitive tasks, improving personalization, or speeding up response times.

For example, AI-powered tools can enhance the customer journey by streamlining touch points where speed and efficiency are critical. Think of an AI-driven chatbot that resolves basic customer inquiries in seconds, freeing human agents to focus on high-emotion, complex moments where empathy matters most. According to [Deloitte](#),³ brands that can effectively integrate AI into their customer journey strategies may see increased revenue growth by providing more personalized and timely customer responses. AI is helping brands review, understand, and translate human behavior and insights more easily than ever.

The beauty of journey mapping is its ability to link technology to ROI. Every investment becomes tied to a business outcome – reducing churn, increasing customer lifetime value, or improving operational efficiency. Focusing on the moments of truth allows you to prioritize the tools and processes that drive real, measurable results.

If a technology investment doesn't enhance your moments of truth, is it worth pursuing?

How Leading Brands Are Mapping Moments

Retail giants like [Walmart](#)⁴ are leading the way in creating seamless omnichannel experiences by leveraging journey mapping to eliminate friction points and reimagine customer interactions. For instance, Walmart's focus on last-mile delivery and curbside pickup highlights their commitment to streamlining complex customer journeys. From autonomous deliveries via their GoLocal program to app-first experiences like Scan & Ship, Walmart continually maps and optimizes customer touchpoints to meet evolving expectations. These initiatives aren't just about convenience—they're about understanding and adapting to the emotional needs of modern customers who demand speed, ease, and flexibility at every step.

T-Mobile and OpenAI are rewriting the playbook for customer experience with their groundbreaking [partnership to launch IntentCX](#),⁵ the first intent-driven AI-decisioning platform. Set to debut in 2025, IntentCX goes far beyond traditional next-best-action solutions, using billions of real-time customer data points to understand intent, anticipate needs, and take proactive actions. Leveraging T-Mobile's award-winning Team of Experts

approach and OpenAI's cutting-edge AI models, IntentCX will deliver hyper-personalized service, meaningful engagement, and real-time decision-making that directly connects to T-Mobile's systems.

This isn't about chatbots – it's about revolutionizing the customer journey by understanding each customer's unique experience and turning insights into tangible solutions. As T-Mobile CEO Mike Sievert puts it, "Our customers leave millions of clues about how they want to be treated through their real experiences and interactions, and now we'll use that deep data to supercharge our Care team as they work to perfect customer journeys."

The question for C-suite leaders is: How can AI enhance human insights rather than replace them? The answer lies in balance. Use AI to automate the mundane and extract more profound insights, but always remember the human connections that build loyalty and trust.



Customers don't remember transactions; they remember how you made them feel.

Beyond the Map

Journey mapping is all about driving measurable outcomes. Whether reducing churn, increasing upsells, or improving operational efficiency, every action should tie back to your business goals.

Here's a simple framework to keep your journey maps actionable:

- Audit your existing maps: Are they actionable or just visuals?
- Prioritize moments of truth: Focus resources where they'll have the greatest impact.
- Measure and iterate: CX is a moving target – keep refining as customer expectations evolve.

Journey mapping is more than a tool – it's a vehicle for transformation. When done well, it aligns your teams, eliminates silos, and empowers you to design experiences that truly resonate. It's how you turn moments of truth into moments of triumph and creating moments your customers will never forget. 🌐

Links:

1. <https://www.gartner.com/en/newsroom/press-releases/gartner-says-most-customer-experience-programs-are-not-deliverin>
2. <https://business.adobe.com/blog/how-to/create-customer-journey-maps>
3. <https://www2.deloitte.com/us/en/insights/topics/marketing-and-sales-operations/global-marketing-trends/2022/end-to-end-customer-experience-ai.html>
4. https://tech.walmart.com/content/walmart-global-tech/en_us/blog/post/how-is-walmart-amplifying-shop-tech-for-its-customers.html
5. https://tech.walmart.com/content/walmart-global-tech/en_us/blog/post/how-is-walmart-amplifying-shop-tech-for-its-customers.html

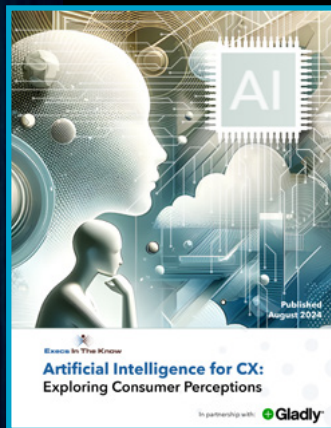


Let Our Insights Illuminate Your Next AI for CX Move

Consumers and customer care leaders can have differing views when it comes to the topic of customer experience (CX). This is especially true when it comes to the specific topic of artificial intelligence (AI) for CX.

Understanding both consumer and industry opinions can provide vital perspective as you plan your next move in the rapidly evolving AI for CX space. Whether you're bringing out your first pawn or are far along into the game, discovering deeper insights ahead of your next move is a winning strategy.

If AI is a part of your game plan, be sure to check out these and other insightful reports:
<https://execsintheknow.com/knowledge-center/cx-research/hot-topics-research/>



- Produced in late 2024 by Execs In The Know in partnership with Gladly and ASAPP.
- Dedicated to creating a deeper understanding of the AI for CX space.
- These reports provide a breadth of data points from both the consumer and corporate perspective.
- Results touch on topics such as current experiences with AI, concerns, and forward-looking plans.



Execs In The Know

MICHAEL KORS

BRAND SPOTLIGHT

Michael Kors



Balancing Innovation and the Human Touch in Luxury Retail

In this Brand Spotlight, Ebrahim Hyder, Vice President of Customer Service at Michael Kors, reflects on his global CX career and how the brand blends personalization, omnichannel service, and digital innovation with human connection. He shares strategies for creating memorable customer experiences, leveraging AI for efficiency and personalization, and mentoring emerging CX leaders. Ebrahim also explores future trends like augmented reality and multimodal AI, offering insights into how Michael Kors stays at the forefront of customer experience innovation.



MICHAEL KORS

Ebrahim Hyder

Vice President,
Customer Service



Execs In The Know (EITK): You've spent two decades in CX across different continents. What are the biggest global shifts you've observed in customer experience, and how have these influenced your approach at Michael Kors?

Ebrahim Hyder: Over my two decade journey, I've witnessed some remarkable transformations. The most profound shifts have been in personalization, omnichannel service, and blending digital innovation with genuine human connection. I vividly recall working in Europe in the early 2000s when customer communication from some EU countries primarily meant handwritten or typed letters – a stark contrast to today's instant, multi-platform interactions.

At Michael Kors, we've embraced these changes by strategically investing in tools that help us understand and anticipate our customers' needs. However, technology is just part of the equation. We've empowered our Style Consultants to deliver experiences that are both authentically Michael Kors and deeply personal. It's a nuanced approach where we use technology to enhance, not replace, human interaction. Additionally, we love weaving in stories about Michael Kors himself – sharing the inspiration behind a

particular piece – which adds a layer of brand storytelling that transforms a simple transaction into a memorable experience. Our goal is finding that perfect balance: leveraging cutting-edge technology while preserving the warm, personal touch that makes a customer feel truly seen and valued.

EITK: Your team has achieved remarkable outcomes, like boosting customer satisfaction by 15 percent while reducing costs by 30 percent. Can you share some of the strategies or innovations that made this possible?

Ebrahim: Our remarkable outcomes – a 15 percent boost in customer satisfaction and a 30



percent cost reduction – weren't just happy accidents. They resulted from a meticulously crafted data-driven strategy that put our customers at the heart of everything we do. We took a deep dive into our customer journey, using the Four Disciplines of Execution framework to prioritize and tackle our most critical challenges.

One of our most significant transformations was reimagining our warranty process. What used to be weeks-long – sometimes months-long – transaction was condensed into a matter of days, sometimes hours. Imagine waiting weeks for a resolution to getting answers on the same day! We didn't stop there. We partnered with a renowned global training provider to develop a custom sales and service training curriculum that empowered our Style Consultants to deliver exceptional experiences.



Simultaneously, we built intelligent self-serve capabilities into our IVR system, allowing customers to independently check order statuses or initiate warranty claims. The magic happened in the balance – by enabling customers to handle simple tasks independently, we freed up our team to focus on more complex, high-value interactions that require a human touch. It was about working smarter, not just harder, and putting our customers' time and experience first.

EITK: You've maintained a an impressive Call Resolution rate across your phone channel. What advice would you give to other CX leaders aiming to empower their frontline teams to drive similar results?

Ebrahim: Achieving our 90%+ FCR isn't just about having a great team – it's about creating an environment where our Style Consultants can excel. We've built a culture of empowerment and accountability that gives our frontline agents the tools, knowledge, and confidence to resolve customer issues on the spot. It's like giving them a toolkit that allows them to be problem-solving





champions. Our commitment to quality is underpinned by continuous monitoring and real-time performance coaching.

During our weekly calibration sessions, we sometimes identify training opportunities and develop coaching to address those needs. We've also introduced Tier 2 support roles, creating a safety net that allowed our Style Consultants to quickly escalate complex issues to more experienced team members. But empowerment isn't just about skills – it's about motivation. We've implemented a recognition program that goes beyond traditional metrics.

Cash incentives and Michael Kors product rewards create tangible recognition for Style Consultants who consistently deliver exceptional service. It's our way of saying, "We see you; we appreciate you, and we want you to shine." The result? A team that's not just solving problems, but creating memorable customer experiences that turn interactions into relationships.

EITK: With a passion for the intersection of human connection and technology, how do you balance emerging technologies with maintaining a personal touch in luxury retail?

Ebrahim: In retail, technology isn't about replacing human connection, but enhancing it.

At Michael Kors, we view emerging technologies as powerful tools that amplify our ability to create meaningful, personalized customer experiences. Our recent implementation of AI-powered agent assistants is a perfect example. These intelligent systems handle routine inquiries with remarkable efficiency and consistency, ensuring we maintain our distinctive brand voice.

By automating these standard interactions, we've liberated our Style Consultants to do what they do best – provide deeply personalized, consultative support. Now, we let technology handle the mundane, allowing our human experts to focus on creating those extraordinary, tailored moments that make a customer feel truly special. That's the sweet spot we aim for – where cutting-edge tech and authentic human connection come together seamlessly.



EITK: How is Michael Kors leveraging AI to enhance the customer experience, and what role do you see AI playing in the future of CX for luxury retail?

Ebrahim: AI is transforming our customer experience in ways that are both innovative and



deeply human. We're using AI to create rich, comprehensive case notes that tell a complete story of each customer interaction. Gone are the days of cryptic, fragmented account notes and histories. Now, our Style Consultants can quickly understand a customer's entire journey at a glance thanks to detailed, yet succinct, AI-generated case notes.

“Our AI Tools are like silent, intelligent partners working alongside our team.”

They help identify potential fraud, preventing abuse of our e-commerce platform. During live calls, the AI listens in real-time, suggesting the most appropriate next steps based on conversation nuances. It's like having a knowledgeable coach whispering strategic advice, ensuring consistency and adherence to our brand standards. Looking to the future, AI will be our gateway to hyper-personalization. We're heading towards a world of predictive analytics and automated workflows that anticipate customer needs before they articulate them. The goal isn't to replace human interaction, but to make every interaction more meaningful, efficient, and tailored to the individual.

EITK: You've been an Advisory Board Member for Execs In The Know since 2019. How has this role shaped your perspectives on CX, and what insights have you gained that you bring back to Michael Kors?

Ebrahim: My role on the Execs In The Know advisory board has been nothing short of a



professional masterclass in customer experience. It's like having a backstage pass to the most innovative minds in CX across different industries. Working alongside exceptional leaders has been transformative for my career and professional growth. Each conversation is an opportunity to share ideas, challenge existing paradigms, and discover new approaches to customer service.

This network isn't just about learning; it's about collective innovation. We're a community of CX professionals relentlessly pushing boundaries and sharing insights that elevate service experiences across industries. The perspectives I've gained influence our call center strategy at Michael Kors, ensuring we're always one step ahead in delivering exceptional customer experiences. To quote Execs In The Know's President, Chad McDaniel, "We're leaders learning from leaders."

EITK: Creating inclusive environments is a priority for you. How does this commitment to inclusivity translate into the day-to-day experiences you deliver for customers?

Ebrahim: At Michael Kors, inclusivity isn't just a buzzword – it's the heart of our customer experience. We've cultivated a team of Style Consultants who are not just multilingual, but truly culturally fluent. Our training goes beyond language skills; we're building a team that can connect authentically with customers from all backgrounds and abilities. Our commitment is simple yet powerful: create an environment where every customer feels genuinely seen, heard, and valued. Whether it's adapting

communication styles, understanding cultural nuances, or ensuring our service is accessible to everyone, we're dedicated to making every interaction feel personal and meaningful.

EITK: Mentoring emerging CX leaders is something you're passionate about. What key lessons do you emphasize when working with new leaders in the industry?

Ebrahim: Mentoring emerging CX leaders is about passing on more than just skills – it's about sharing a philosophy of leadership. I always emphasize that true customer experience excellence starts with empathy and genuine connection. One of my most powerful mentoring lessons is the importance of staying close to the frontline. I make it a point to personally take customer calls when I visit our call center.

It's not just about understanding challenges – it's about experiencing them firsthand. These moments provide invaluable insights into both customer needs and the daily realities of our team. The key messages I share are simple but, hopefully, transformative: Lead with empathy, empower your teams, and never stop learning.

As CX leaders, our most important job is to create an environment where both customers and team members feel truly valued.

EITK: How has your approach to customer-first digital transformation evolved, especially as customers increasingly expect seamless, personalized experiences?

Ebrahim: Digital transformation is an art of balance – we're not just automating tasks, we're creating experiences. Our approach has become more nuanced, focusing on seamless,

personalized interactions that feel effortless and human. We've developed AI technologies that are incredibly flexible, allowing us to create real-time, customized solutions that quickly adapt to both business and customer needs.

The magic happens when we can anticipate and respond to customer expectations without losing the personal touch that defines luxury retail. It's about reimagining digital interactions as opportunities for connection, not just transactions. Our goal is to use technology to make customers feel understood, valued, and cared for – every single time.

EITK: What future CX trends excite you the most, and how are you preparing your team at Michael Kors to stay at the forefront of these changes?

Ebrahim: At Michael Kors, we're always looking to the future to find ways to elevate our CX. I'm most excited about the advancements in AI and AR (Augmented Reality) and their potential to revolutionize customer service. These technologies are set to transform how businesses interact with customers, offering more immersive, efficient, and personalized support experiences.

Key CX trends we're looking forward to:

Augmented Reality Integration

- Visual Remote Assistance will enable our agents to provide real-time visual guidance by seeing what customers see through smartphone cameras
- Virtual product demonstrations will allow customers to view 3D models, customize features, and assess product fit before purchasing
- These capabilities should increase customer confidence and reduce return rates

AI-Powered Customer Service

- Developing multimodal AI assistants that integrate voice, text, and visual interactions seamlessly
- Implementing predictive AI to anticipate potential customer issues and enable proactive support
- Exploring Emotion AI to analyze customer sentiment and adjust interactions accordingly

Our strategy balances technological innovation with maintaining the human touch that our customers value. In the future, if we implement some of these advanced capabilities, we will always aim to create more personalized, efficient, and emotionally intelligent customer experiences. 🌟



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 Ebrahim Hyder and the Michael Kors 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.

[Go back to all articles.](#)



KIA ONLINE COMMUNITY MEMBER SPOTLIGHT



JESSICA PATEL

Senior Director of Customer Experience

Jessica manages the relationships with Belk's Business Process Outsourcing (BPO) providers and works closely with various teams across the organization to improve overall customer experience. Since joining Belk in 2020, Jessica has improved the overall customer experience by partnering with cross-functional teams to ensure the voice of the customer is heard. Jessica and her team help keep the customer front and center as the business makes changes online and in stores. Recently, she successfully led a complete BPO transition for Belk that reduced costs and improved overall customer satisfaction scores.

She has extensive experience in various roles and departments, including Operations, Leadership, Quality and Training, Human Resources, and IT. She has a deep understanding of the needs and challenges faced by industry professionals and is passionate about finding innovative solutions to improve customers' experience. Jessica believes that people work for people and is passionate about leading and developing her team.

“ I am excited to be a KIA Champion because it allows me to give back to the CX community and help others who may need a sounding board to bounce ideas or navigate opportunities that arise in the CX space. ”

Experiences That Go Beyond Transactions

By blending personalization, convenience, innovation, and community care, Belk builds meaningful, lasting customer relationships.

Execs In The Know (EITK): A consistent commitment to outstanding service is essential. When creating unforgettable customer experiences, no detail is too small. In what ways does Belk seek to 'wow' its customers?

Jessica Patel: Belk is deeply committed to delivering exceptional customer experiences that leave a lasting impression. We prioritize what matters most to our customers by offering a curated selection of Belk-exclusive and national brands they know and love.

Our approach centers on meeting customers where they are—whether in-store or online—while ensuring convenience and seamlessness at every step. Services like buy online, pick up in-store (BOPIS), same-day delivery, and hassle-free returns make shopping easy and enjoyable, reflecting our dedication to removing friction from the customer journey.

At Belk, we believe in fostering genuine relationships, both with our customers and within the communities we serve. Our commitment extends beyond the shopping experience to active community engagement, including local initiatives, philanthropy, and sustainability efforts. We strive to make a positive impact in the places where we live and work, building loyalty and trust through shared values.

By blending personalization, convenience, innovation, and community care, Belk consistently seeks to ‘wow’ its customers and create experiences that go beyond transactions to build meaningful, lasting relationships.

EITK: Belk utilizes Medallia for surveys and survey data. How has leveraging this platform influenced your approach to gathering customer insights and driving impactful CX strategies?

Jessica: Medallia has been an invaluable tool for gathering customer insights and shaping our CX strategies at Belk. The platform provides us with real-time customer feedback, enabling us to better understand their needs, expectations, and pain points. Having this direct line of communication has fundamentally influenced how we approach CX. One of the most impactful aspects of Medallia is its ability to centralize and analyze customer feedback across various touchpoints. It allows us to identify trends, uncover root causes of dissatisfaction, and highlight areas where we’re excelling. This data empowers our teams to make data-driven decisions and prioritize initiatives that will have the greatest impact on the customer journey.

For example, we use Medallia’s insights to create action plans at both the strategic and operational levels. Whether it’s refining in-store experiences, improving online shopping



“ We strive to make a positive impact in the places where we live and work, building loyalty and trust through shared values. ”

functionality, or enhancing our customer care processes, the platform helps us track improvements and measure their effectiveness.

Additionally, Medallia allows us to foster accountability and collaboration. Teams across the organization are aligned on customer-centric goals, as we can seamlessly share data, successes, and lessons learned. Medallia has also enabled us to celebrate wins by recognizing teams and individuals who deliver outstanding customer experiences, reinforcing our commitment to excellence.

Ultimately, leveraging Medallia has allowed us to be more proactive in addressing customer needs and has helped us transform feedback into meaningful actions that drive loyalty and long-term growth.

EITK: Outsourcing can significantly impact customer experience operations. How do you determine which aspects of CX to manage in-house versus through outsourcing partners?

Jessica: Deciding which aspects of CX to manage in-house versus outsourcing requires a

strategic balance between maintaining quality, optimizing costs, and ensuring scalability. A few considerations guide my approach.

Core Competencies and Brand Alignment:

Functions closely tied to Belk's brand identity, customer relationships, or specialized knowledge are typically managed in-house. For example, tasks requiring deep familiarity with our products, services, or customer base are better suited for internal teams to ensure authenticity and consistency in customer interactions.

Scalability and Volume Management:

Outsourcing is particularly valuable when managing high-volume or repetitive tasks, especially during seasonal peaks or promotional surges. We can quickly scale operations by leveraging trusted partners without sacrificing service quality. For instance, outsourcing frontline support or administrative tasks allows our internal teams to remain focused on more complex, strategic initiatives.

Expertise and Cost Efficiency: I believe that most customer experience operations can be better managed by outsourcing partners since

they bring expertise and advanced technology to the table. This allows us to deliver high-quality service at a lower cost without the need for significant internal investments.

By taking this balanced approach, we maximize outsourcing's strengths while maintaining control over the aspects that define the Belk brand and customer experience. This strategy provides the flexibility to deliver exceptional service and adapt quickly to evolving customer needs.

EITK: What excites you most about the future of customer experience at Belk?

Jessica: I am most excited about the innovation of advanced technologies, including AI, and how it will help us continue to understand our customers better. Integrating more technology will help us improve the customer experience and allow our teams to focus on what matters: our customers' experience. I'm also excited to strengthen the bond between Belk and our

customers. By honoring our brand's history while embracing modern trends, we can strengthen loyalty beyond transactions.



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Ultimately, what excites me most is that we are not just responding to customer expectations; we are shaping the future of retail experiences, and I'm honored to be part of it.

EITK: How would you describe your leadership style, and how has it evolved throughout your career?

Jessica: My leadership style is rooted in servant leadership. I focus on empowering and supporting my team while fostering a collaborative environment where everyone feels valued and can thrive. I believe that by investing in people and building strong relationships, we achieve better outcomes not only for the team but also for the organization and the customers we serve.

Over the years, my leadership style has evolved as I've gained more experience and insight. Early in my career, I focused on mastering operational tasks and meeting immediate goals. As I grew into leadership roles, I realized that true success comes from developing others, creating a vision, and ensuring the team has the resources and guidance it needs to succeed.

My time working in diverse areas like call centers, operations, and cross-functional teams has taught me the importance of adaptability and empathy. I've learned to listen more intentionally, address challenges with a solutions-focused mindset, and balance strategic decision-making with a people-first approach.

One of my favorite quotes by Brené Brown resonates deeply with me: "I define a leader as anyone who takes responsibility for finding the potential in people and processes, and who has the courage to develop that potential." This perspective has been my guide, helping me continuously refine my leadership approach and focus on making a meaningful impact.

EITK: As one of our inaugural KIA Champions, how has being part of the Execs In The Know KIA Community supported your role in leading CX?

Jessica: EITK has helped me stay current with industry trends and provided a network of like-minded individuals with whom I can discuss new ideas, concepts, and solutions to everyday business challenges.

EITK: Why are you excited about this opportunity?

Jessica: I am excited about this opportunity because it allows me to give back to the CX community and help others who may need a sounding board to bounce ideas or navigate opportunities that arise in the CX space.

EITK: Even the most successful and productive leaders prioritize outside interests and passions. How do you prefer to spend your leisure time?

Jessica: I enjoy traveling, spending time with family, and attending wine tastings. I recently set a goal to see all 50 states before I am 50. Only 13 more to go!

EITK: What advice would you offer to emerging leaders in the CX field who aspire to make a meaningful impact in their organizations?

Jessica: My advice for new leaders in the CX field is to focus on three main principles:

networking, adaptability, and continuous learning.

Build Relationships/Network: Building strong relationships across departments is crucial. Collaboration drives success, and working together leads to a cohesive customer experience.

Adaptability: The CX field is always changing, so stay flexible. Whether using new technology or adjusting based on feedback, adaptability keeps you ahead. Embrace new ideas and improve experiences.

Continuous Learning: CX is dynamic, so always be willing to learn. Engage in education and mentoring, and stay updated on trends. Knowledge helps you make better decisions for your organization.

Finally, focus on developing and empowering others. Building strong teams is critical for your own success. Your goal should be for your team to run the business successfully when you are away and feel empowered to make key decisions in your absence! ✂️



Execs In The Know

Thank you to Jessica Patel for her leadership, participation, and insights. To connect with Jessica 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.....](#)

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Interested in taking part in a future Brand Spotlight feature and sharing your story? [CLICK HERE.....](#)

info@execsintheknow.com





JOIN THE KNOW IT ALL (KIA) COMMUNITY

Where CX Leaders Connect, Collaborate, and Innovate

Be part of a thriving community dedicated to advancing customer experience excellence. It's the perfect place to ask questions that only other CX end users will understand and have the relevant advice and insights you're looking for.



New in 2025: The KIA Champions Program!



The KIA Champions Program is an exciting new initiative that recognizes the top contributors within the community. Selected Champions will share their expertise, lead discussions, and foster collaboration. KIA Champions will be proudly identified with a digital badge, signifying their leadership and contributions.

Visit us at <https://community.execsintheknow.com/participate/about-kia> and become a part of this incredible community today!

Break The Stigma



CREATING A POSITIVE IMPACT IN OUR WORLD

In our community, care runs deep. It's not just about advancing our industry — it's about standing by one another and addressing the challenges that shape the lives of our friends, families, and colleagues. Through Execs In The Know's Leading with Impact initiative, we're stepping outside the boardroom to focus on the issues that truly matter.

We're shining a light on mental health awareness by partnering with NAMI (National Alliance on Mental Illness). Together, we aim to break the silence, remove the stigma, and foster understanding. But, we can't do it alone. We're calling on our CX community to take a stand. Be a stigma-free leader, a supportive co-worker, a compassionate friend, and a trusted family member.

Because Leading with Impact starts with leading with empathy. Let's work together to build a future where mental health is understood, accepted, and prioritized — for everyone.

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





Execs In The Know

CX LEADERS
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Save the Date

Virtual Rapid-Fire AI for CX Use Cases May 6, 2025

AI is the key to unlocking smarter, more efficient customer experiences. But, knowing where to start (or how to scale) can feel overwhelming. The truth is, AI's real power lies in action – not theory. It's about moving beyond conversations and into real-world results that drive measurable business impact.

That's why we're bringing CX leaders together for a no-fluff, fast-paced virtual use cases event designed to inspire action and spark new ideas.

Our expert panel will showcase real-world AI use cases across industries, share the business wins behind the buzz, and provide actionable insights to help you turn AI talk into AI traction.

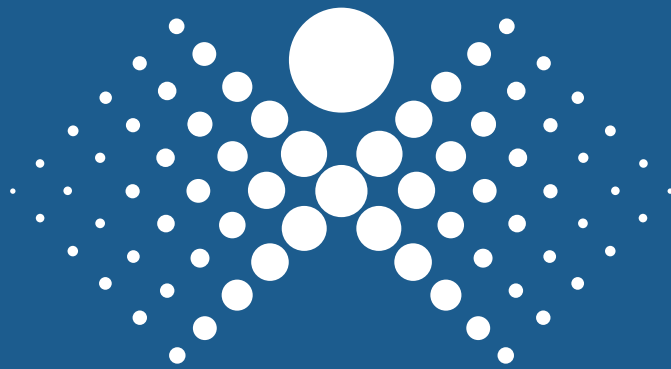


In-Person Outsourcing Briefing June 10, 2025

Join 20-30 peers and expert panelists for a concise overview of key developments, emerging technologies, and evolving customer expectations. Gain the knowledge to make informed decisions, align strategies, and stay ahead in the competitive CX landscape.



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