

OCTOBER 2025 | QUARTER 4



# CX Insight

AN EXECS IN THE KNOW PUBLICATION

## Leading with Clarity in the Age of Distraction

**Beyond Resolution: How AI is  
Redefining Customer Experience**

**How Back-Office Operations Contribute to  
CX Improvements**

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# Welcome

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

## Choosing Clarity in the Next Chapter of CX

As Q4 ramps up, the weight of decision-making becomes heavier, and clearer thinking becomes harder. With 2026 on the horizon, CX leaders are pulled between the now and the next: closing the year strong while planning for what's ahead. This final stretch isn't just about execution, it's about clarity. In a noisy, fast-moving world, the ability to focus, prioritize, and lead with intention is a competitive advantage.

This issue of *CX Insight* explores how clarity shows up across today's CX landscape, from governance to growth strategy, from predictive AI to operational excellence. We examine how leading brands are rethinking what quality means in an automated world and why AI satisfaction metrics must evolve alongside consumer expectations.

We also spotlight an often-overlooked performance driver: back-office operations and we challenge leaders to break down internal silos, elevate operational voices, and reframe the back office as a strategic CX lever, not a cost center.

You'll also hear from trailblazers shaping retail and fan engagement. Fanatics dives into emotional connection at scale, while Crate & Barrel emphasizes collaboration and human-centered design as pillars of long-term CX excellence.

Looking ahead to 2026, the most effective CX leaders aren't chasing speed—they're choosing signal over noise, elevating both emotional intelligence and operational rigor. We hope this issue fuels your focus and strengthens your clarity as you lead your teams into the year ahead.

### Execs In The Know

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# Leading with Clarity in the Age of Distraction

A former NFL quarterback and current Senior Director at one of the nation's largest churches (18 campuses, 60,000 attendees, 400 employees) shows how to train focus under pressure and build systems where frontline teams thrive.

by Execs In The Know

The modern workplace runs on pings and pop-ups. Every hour brings another dashboard, another alert, another demand for attention. Information has never been more abundant, or more exhausting. But, what if the defining skill of leadership today isn't absorbing more data, but filtering it? What if the real edge lies in discernment: the ability to separate the trivial many from the vital few?

That is the question Travis Brown pressed onstage at the Customer Response Summit (CRS) in San Diego in September. Brown is not a conventional business thinker. A former NFL quarterback, he built his career in environments where clarity under pressure was not optional, but a matter of survival. Today, his work is rooted in the same conviction: clarity doesn't materialize on its own. It is chosen, practiced, and protected.

The lesson for executives is as uncomfortable as it is liberating. In a world addicted to more – more dashboards, more key performance indicators (KPIs), more meetings – clarity demands subtraction. What are you willing to mute so your team can hear what matters? Where are you willing to trade breadth for depth, noise for signal, speed for steadiness?

The ability to rise above the noise, name what matters, and act with conviction has become the defining edge. Read on to learn how to simplify the noise, anchor to purpose, and build teams that focus on what truly matters.

## How to Design for Clarity

The hardest part of modern leadership isn't finding answers; it's choosing attention. In an economy that monetizes our every glance, the leaders who win aren't the loudest or the busiest; they're the clearest. The best leaders don't chase more; they choose better discipline inputs and curate the voices they trust. And they decide, in advance, what deserves their and their team's limited focus.

Brown has learned that discipline is essential under bright lights and in high-stakes situations. An All-American quarterback at Northern Arizona who went on to spend six seasons in the NFL (Eagles, Seahawks, Bills, Colts), Brown understands what pressure does to human performance and how to design for clarity when the clock is running and the margin is thin.

Today, as Senior Director of Campus Teams at Christ's Church of the Valley (CCV) in the Phoenix area, he oversees 18 campuses, a weekly attendance of roughly 60,000, and approximately 400 employees. His core conviction is simple, and relentlessly practical: focus can be trained.

"Playing college and professional football placed me in environments that demanded my full attention while bombarding me with distractions. I learned how to lock in on the task at hand and cut through the noise, not just for myself but for the entire team. That discipline has carried into my leadership today – focus on what truly matters in the moment," Brown explains.

**Focus starts with knowing your direction. Once you know who you want to be and where you're headed, you can filter out what doesn't matter.**

What, exactly, is focus? It's giving your attention to the right thing, at the right time. During his keynote, Brown noted that the average person now consumes the equivalent of 74 gigabytes of information a day (roughly 16 full-length films), up from 34 GB in 2009. We consume more information in one day than someone from the 15th century consumed in their entire lifetime.

At work, the average employee context-switches around 1,200 times a day, leaking about 40 minutes of productivity every day into the cracks. Distraction isn't a character flaw; it's a system. Leaders who don't counter-design for it will spend their careers reacting.

The countermeasure isn't more willpower or apps. It's your starting posture: begin centered so you can absorb the noise and lead steadily.





## Start Centered, Lead Steadily

Brown's reputation for steadiness didn't emerge from theory. Early in his post-NFL life, he and his wife welcomed twins born at 27 weeks, weighing just over one and two pounds each. Their neonatal intensive care unit (NICU) stay stretched to 72 days. At the time, he had three children under six at home, had just retired due to injuries, and the economy was in a state of collapse.

That season of life, he says, forced him to "right-size" everything. Urgency clarified what endures; noise fell away. "When doctors tell you your son may only live another hour, all the other noise – markets, possessions, distractions – fades quickly. The twins are 17 now and thriving, but that perspective has never left me."

It's why, to this day, he starts his mornings in silence, reading, reflecting, journaling, before he ever opens a screen. Rituals don't make leaders rigid; they make them ready.

"Focus starts with knowing your direction," explains Brown. "Once you know who you want to be and where you're headed, you can filter out what doesn't matter. That's why my mornings are sacred. I don't need my phone or computer. Distractions don't get to set the agenda. By blocking what doesn't matter in that moment, I start the day centered and focused. When leaders take care of themselves, they're better in every other area of life. The ministry has shown me what truly matters in high-pressure moments. Sitting with families in tragedy or crisis strips away everything nonessential. Perspective is clearer when you've seen what doesn't last."



I regularly challenge our leaders with this:  
Are we making things simpler or more  
**complicated?**

And when change is constant, Brown anchors his teams in a phrase that cuts through the angst of new tools, new structures, and new expectations, saying, "We're married to the mission, but only dating the methods."

It's a position of conviction without rigidity, exactly the temperament customer experience (CX) organizations need as technology accelerates and customers' expectations rise. "At CCV, everything is constantly shifting – growth, expansion, change. Our mission remains unchanged, but our methods often evolve. If you cling too tightly to methods, change will frustrate you. Stay anchored in mission."

### Discipline Your Inputs

Brown asked a tricky question to our audience at CRS: "Is the information I'm giving or consuming actually beneficial?" In CX, we take pride in our instrumentation, dashboards, and alerts. "I regularly challenge our leaders with this: *Are we making things simpler or more complicated?*" he says. Tools should reduce cognitive load for the frontline, not increase it. If a new system adds steps without adding clarity, it's noise, no matter how clever the feature list.

That same scrutiny applies at the personal level. Cleaning up inputs isn't an existential audit; it's a habit that should be adopted. Brown's advice: start with the obvious workarounds and zombie reports – the ones no one can explain, but everyone still receives.

"Simple wins create space for what truly matters," he notes. Focus grows where clutter shrinks. "Technology promises efficiency but often creates noise. Leaders need to ask: *Does this tool simplify or complicate the process? Does it serve our people, or does it serve itself?* If it adds clutter instead of clarity, it's not worth it," Brown adds.

### Clarity for the Frontline

Frontline contact center agents face constant distractions while trying to stay present with customers. Clarity helps them cut through that noise so they can focus on the real goal of solving the customer's problem. When agents know what matters most in a call, they can stay calm, make quicker decisions, and avoid getting lost in endless alerts or competing priorities.







Clear direction also builds confidence. Agents who understand which metrics truly drive customer satisfaction can utilize artificial intelligence (AI) tools and data as support, rather than distractions. That focus keeps conversations human, improves service quality, and reduces burnout – benefits that ripple across the entire customer experience team.

The key question leaders must ask is: Does the information I'm giving my team help us accomplish our mission?

"If frontline teams are bogged down with endless alerts, dashboards, and updates, they won't serve customers well," Brown explains. "Growth naturally brings more systems, but we have to fight for simplicity. I regularly challenge our leaders with this question: Are we making things simpler or more complicated? Our frontline teams need us to keep things simple. With 18 campuses, we pilot new tools in smaller contexts first. We gather feedback from the people who actually use them to ensure they empower rather than overwhelm. Rollouts should build confidence, not confusion."

### ***Learning from Setbacks***

Failure has a way of shaking us out of autopilot. When the usual methods don't work, we're pushed to reimagine, test new ideas, and try solutions that might not fit neatly into the box. That discomfort often becomes the spark that leads to real breakthroughs. In this sense, setbacks aren't just obstacles; they're raw material for creativity and innovation.

Start treating failure as fuel, not a dead end. Instead of labeling mistakes as defeats, use them as springboards to explore fresh approaches and experiment with bold ideas. Build a culture where calculated risks are encouraged and missteps are recognized as part of the creative process. When both wins and losses are valued, your team will see each step – forward or sideways – as movement toward discovery and progress.

"I once drove my father-in-law's diesel truck and accidentally filled it with regular gas. A quarter mile later, the truck broke down on the side of the road. The lesson? Details matter. One small misstep can lead to significant problems. I also learned my father-in-law is very forgiving!" says Brown.

**Don't fear failure. If a team never fails, they're not trying enough new things. Celebrate innovative attempts, even if they miss. What you celebrate will be repeated.**

**The world is vying  
for your attention...  
but your world  
needs it.**

reovate

### Curate the Right Voices

Information is one thing; influence is another. In a world of constant commentary, Brown urges leaders to curate the voices that actually help you see. He asks two questions: *Are the voices I'm listening to beneficial? And have they been where I am – or where I want to go?*

The loudest voice is often that of the customer; the wisest voice is often that of a peer or mentor who has carried similar weight. Great leaders don't pretend to know everything. Great leaders don't always have all the correct answers; they ask the right questions.

Importantly, Brown flips the mirror: what does your team hear when they hear your voice? Do your words lower the temperature, clarify the next move, and reinforce standards? Or do they add static to an already noisy system? In pressure moments, teams need steadiness, not volume.

### Choose Your Altitude (On Purpose)

One of Brown's most useful operating models is what he calls leadership altitude. Some days demand the balcony; others require the trenches. The point isn't to pick one; it's to know your current altitude and communicate accordingly.

"Every day I shift leadership altitude," he says. "One moment I'm looking one to three years ahead; the next I'm down in the weeds on an operational challenge. Both perspectives are important, and they inform each other. My football background reminds me of this. On the field, I needed a coach in the box, seeing the game from a higher altitude with a broader perspective. I could only see what was right in front of me, while he could see the whole field. Both views were critical, but they required clear communication. The same is true in leadership: altitude only helps if we communicate clearly about what we see."



Altitude mistakes are costly: too much time spent low, and the business drifts; too much time spent high, and you miss real-world friction. Brown suggests designing your calendar to match the altitude you intend, strategic blocks protected from tactical interruptions, and tactical windows where you're intentionally present with frontline realities. In meetings, label the altitude: are we here to decide strategy, or to solve execution? Mixed altitudes make for muddled outcomes.

"The best leaders anticipate when they'll need to operate at different altitudes and build their schedule around that. You can't plan every frontline detail, but you can protect time to think strategically and set your headspace. One practical shift: ask questions. Leaders often stay in decision-making mode, but slowing down to ask clarifying questions helps ensure decisions are rooted in understanding," Brown adds.

### In the AI Era, EQ is the Edge

Brown is enthusiastic about technology, including automation, analytics, and AI, which removes toil and elevates experiences. But he is blunt about the differentiator: "With all the conversation around AI, the differentiator will actually be emotional intelligence (EQ). Systems can be trained, but



empathy can't be automated." Leaders who read the room, manage themselves effectively, and connect across diverse contexts will outpace those who merely deploy tools.

Operationally, EQ shows up in choices that never make a product roadmap: when a bot hands off before frustration peaks; how a frontline leader acknowledges emotion before quoting policy; which metric gets deprioritized so a human can stay with a customer two minutes longer. It's the tone of a make-good, the cadence of an apology, the judgment to do the unscalable thing at the exact right time. AI gives us time back; EQ determines where that time delivers trust.

Teams with high EQ convert tense moments into loyalty, surface richer insights from verbatim feedback, and design journeys that prioritize dignity. Leaders can hardwire it: hire for curiosity, coach with live call reviews that name emotions, reward outcomes that balance efficiency with care, and give playbooks that script principles, not people. In other words: "AI is less than EQ when the work is human," says Brown.





# A Practical Playbook

Focus doesn't happen by accident; it's engineered through a few small habits done consistently. Use this playbook to eliminate distractions, amplify the right voices, and ensure every decision is grounded in customer impact.

**1**

**AUDIT THE INPUTS.** This week, remove one data stream your frontline doesn't need. If it doesn't change a decision, it doesn't deserve attention. "As a leader, if you don't decide ahead of time what information matters, the loudest thing will always win," says Brown.

**2**

**START WITH THE EASY DISTRACTIONS.** Like cleaning out a closet, begin with what you know doesn't add value. "In teams, those are the dead skunks – the systems, processes, or reports no one knows the purpose of anymore. Eliminate those first. Simple wins create momentum and clear space for what truly matters," Brown adds.

**3**

**CURATE THE COUNCIL.** Identify two voices you'll dial up this quarter: a peer who's been where you're going and a mentor who helps you zoom out. Then identify one voice you'll dial down. Write it down so your future self can't wriggle out.

**4**

**SET ALTITUDE BLOCKS.** Protect a weekly 90-minute session for balcony work. Just first-principles thinking: What is our mission? What are the fewest moves that advance it? Then, end the week with a 45-minute trench check with frontline leaders: Where's the friction? What's ambiguous? What's working?

**5**

**PILOT IN SMALL ARENAS.** Brown's team rolls out new tools in contained contexts, learns from the people who actually use them, and only then scales. Rollouts should build confidence, not confusion.

**6**

**CELEBRATE PROCESS, NOT JUST OUTCOMES.** "Don't fear failure. If a team never fails, they're not trying enough new things. Celebrate innovative attempts, even if they miss. What you celebrate will be repeated," he added. "I define wins by process, not just outcomes. If my team is committed daily to serving, growing, and giving their best effort, that's a win." Applaud the behaviors that create the results, like clear handoffs, well-written decision docs, and crisp one-page briefs, so they compound.

**7**

**CUSTOMER IMPACT IS YOUR NORTH STAR.** "Always make it personal. I imagine a close family member as the customer and ask, 'How would I want them to be treated?' That perspective keeps people at the center. Stories help, too. Customers aren't numbers; they're people with challenges, emotions, and relationships. When teams hear a story, they don't see a number; they see a person. That's what CX is really about."



## Are You Leading with Clarity?

The attention economy isn't going away. "The world is vying for your attention ... but your world needs it," he urged during his keynote. In the end, clarity is less a lightning bolt and more a rhythm you train into the day. It's the huddle before the snap: choose your altitude, call the play, and trust the reps you've put in.

The leaders who steady a room aren't louder; they're anchored. They start centered so they can lead steadily. They're married to the mission and only dating the methods, which means change doesn't shake them; it serves them. They curate the few wise voices that sharpen perspective, strip away the dashboards that don't change decisions, and roll out tools in small arenas so confidence grows before complexity does. When pressure spikes, they lower the temperature, name what matters, and give their teams the rare gift of focus: the right thing, at the right time.

So, what does this look like in practice? Protect one balcony block to think from first principles. Walk the trenches and ask what's frictional or kill a zombie report. Pilot the smallest version of the next idea or coach for focus, just as quarterbacks practice under pressure, on speed, and on repeat, so that the response becomes instinctual.

**I define wins by process, not just outcomes. If my team is committed daily to serving, growing, and giving their best effort, that's a win.**

And when the choice is between speed and humanity, let EQ lead; that's where trust is built and loyalty compounds. The world will continue to vie for your attention. Give it, intentionally, to the work and people that last, and watch clarity turn into a competitive advantage. **Give your attention to the right thing, at the right time.**







Customer Response Summit (CRS) is where the world's leading customer experience brands come together to define what exceptional care means today, and tomorrow.

From mainstage keynotes to breakout sessions, the summit is rooted in connection, innovation, and the pursuit of better. Over three unforgettable days at The Ritz-Carlton, Amelia Island, you'll exchange hard-won insights, challenge assumptions, and explore new ways to deliver care without compromise.

We'll also be celebrating 15 years of CX excellence with a red carpet gala honoring the leaders, moments, and ideas that continue to shape the future of customer experience.

Join 200+ senior CX leaders, February 25-27, 2026, and be part of the conversations shaping the next era of CX.



***"You get to connect with other industry peers in an authentic, real face to face way, and to understand that you're not the only one facing the same challenges. I'm excited to go back now and take the lessons that I've learned and turn them into realities for us and for our customers."***

**– Stephanie Stafford**

Senior Director, Customer Experience, YETI



Learn more &  
register today!

**SAVE THE DATE**  
**CRS Scottsdale, Arizona**  
**September 30-October 2, 2026**





# Beyond Resolution: How AI is Redefining Customer Experience

Discover how AI is transforming CX from a cost center to a brand-building engine through faster, more personalized support at scale.

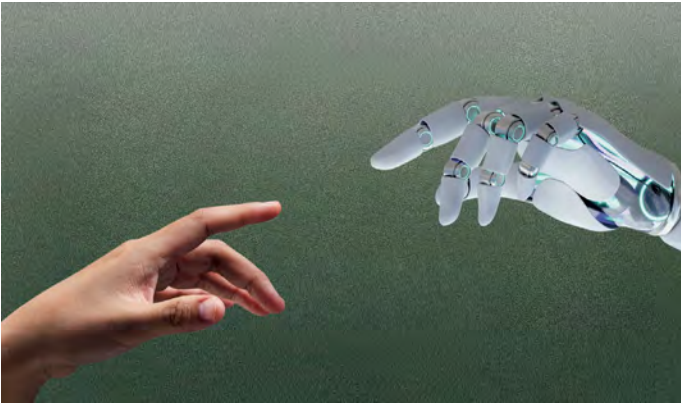
*Contributed by Sierra*

## Experience Meeting Customers Where They Are

Across industries, customer experience (CX) has emerged as one of the clearest differentiators. A recent survey found that more than 80% of consumers are willing to switch brands after just one poor interaction. At the same time, rising costs of service delivery – the average price of a phone call to a consumer brand ranges from \$5 to \$20 – is putting real pressure on organizations.

Meanwhile, customer expectations continue to rise. They want instant responses, 24/7 access, and personalized help that feels as seamless (and targeted) as their favorite consumer apps. For executives, this creates a paradox: how to deliver more, faster, without exploding costs or burning out teams.

This is where AI agents, thoughtfully deployed, can serve as more than cost savers. They can become ambassadors for the brand itself, acting as an extension of its voice and values. Agents can be used to build stronger relationships between companies and consumers, enabling brands to communicate with more of their customers more frequently and in more meaningful ways.



## The Challenge: CX at Scale

Even the most forward-thinking companies struggle to keep up with the changing needs of consumers. Take financial services. Millions of Americans rely on digital-first platforms for everyday banking and payments. These organizations have reshaped consumer expectations, offering easy sign-up, instant transactions, and intuitive interfaces. But behind the scenes, they often face the same bottlenecks as traditional incumbents: high inbound volume, repetitive questions, and long wait times for support.

This isn't just a financial services story. Retailers, travel companies, healthcare providers, and telecom operators all wrestle with similar dynamics. Questions about account balances, order status, appointment scheduling, or troubleshooting can overwhelm contact centers – eroding both customer sentiment and employee morale.

Historically, the industry leaned on deflection strategies, like FAQ pages or static chatbots, to reduce volume. But these tools often frustrate customers instead of resolving their needs. Phone calls are also ineffective due to their high price tag; most conversations are not worth the \$20 price tag of a call today. As a consequence, it is nearly impossible to talk to most consumer brands. True transformation requires a new approach.

## A Case in Point: Chime

Chime, one of the largest U.S. fintech companies, built its reputation on delivering fee-free banking to everyday Americans. Millions of people turn to Chime as a consumer-friendly alternative to

traditional banking. The company has long defined itself by a brand experience that puts the member first.

By partnering with [Sierra](#), a leading AI customer experience platform, Chime reimaged how customers' questions get resolved. Instead of treating automation as a barrier between members and human agents, Chime deployed AI agents that act as brand extensions – available around the clock to handle routine inquiries with accuracy and empathy.

"We always aim to provide banking solutions for our customers that feel simple, human, and on their side," said Janelle Sallenave, Chief Experience Officer at Chime. "Partnering with Sierra helps us deliver on that promise by making support even faster and more personalized."

The results speak for themselves. Resolution rates increased from 50% to over 70%, indicating that more than two-thirds of member questions are now resolved instantly. Members now receive fast, clear answers on everything from the status of a direct deposit to resetting their password. Importantly, Chime reports that Sierra's agents show "significantly better" resistance to hallucinations – a critical factor in financial services, where trust is non-negotiable.

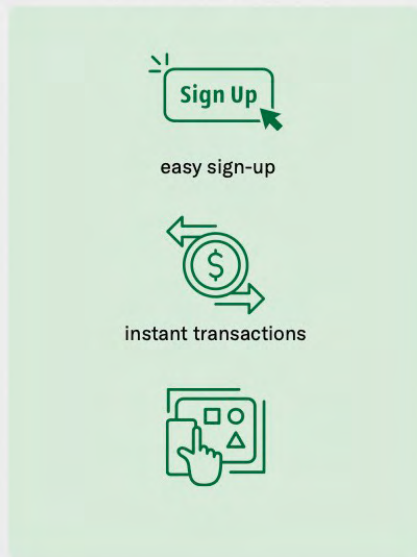
For Chime, the benefits extend beyond metrics. Their team is now freed to focus on complex, higher-value problems that require judgment and care. Members get faster service and clearer communication. And the brand strengthens its reputation for accessibility and reliability.

**AI agents aren't just answering questions. They are embodying the company's voice, tone, and values.**



## Customer Experience

### Expectation



### Reality



### From Cost Center to Brand Builder

This illustrates a larger shift. For decades, customer service has been treated primarily as a cost center – something to optimize, contain, and streamline. But when AI is deployed strategically, service becomes a brand builder and also a revenue driver.

That's because AI agents do more than answer questions. They bring a company's voice and values to life. By consistently and accurately handling inquiries, they reinforce trust in every interaction. By being always available, they reduce the frustration of waiting on hold or navigating complex menus.

And by seamlessly escalating to customer experience representatives when needed, they create a sense of partnership between technology and people.

This philosophy shift pays dividends. Operating costs decrease. Employee satisfaction rises because agents spend more time solving meaningful problems. And most importantly, customers walk away feeling heard, helped, and valued – which means they stick around longer and recommend Chime to their friends.

### Beyond Resolution by the Numbers

#### The Results:

- Resolution rates increased from 50% → 70+%
- Customer experience representatives freed to focus on higher-value work
- Faster answers on direct deposits, account access, and password reset
- Strong reputation for accessibility and reliability

### Best Practices for AI-Powered CX

1

#### Design for outcomes, not scripts.

Traditional chatbots rely on rigid decision trees that fail to capture the nuance in how customers talk – or what they need. AI agents can think, reason, and take action. So, build them with clear outcomes in mind that resolve the underlying issue and do not just deflect it. For example, Sierra's approach emphasizes measuring resolution rates and customer satisfaction rather than completion of a scripted flow.

## 2 Embed AI into existing ecosystems.

The most effective AI agents are not bolted on as an afterthought. They are integrated into knowledge bases, help centers, and workflows.

## 3 Build for trust.

Accuracy and hallucination resistance are critical. In sectors like finance and healthcare, one wrong answer can have serious consequences. Sierra uniquely mitigates this, turning immediate performance into lasting customer trust and improving the lifetime value of its customers.

### Lessons from the Front Lines

- What customers want is not a human or software – it is a solution.
- People matter more than ever. AI frees them to focus on high-value cases.
- Proactive service is within reach. By analyzing patterns, AI can anticipate issues before they arise.

### The Future of CX

Looking ahead, it is possible to imagine a world in which companies are able to deliver experiences that are continuous, contextual, and consistent across channels, instead of fragmented or reactive.

With the conversation as the interface, the promise of true personalization finally comes into reach. Instead of forcing customers to navigate menus, every reply, every interaction, even every pixel is generated in direct response to them.

With always-on, customer-facing AI agents that are accurate and aligned with brand values, platforms like Sierra are enabling companies to move beyond resolution.

“We view customer service as much more than a tool for answering questions,” said Clay Bavor, cofounder at Sierra. “It is a way of bringing a brand’s voice and values to life. With Sierra, our agents free up teams to focus on more meaningful work, while customers get personalized, delightful consumer experiences. This is how customer experience moves from a cost saver to a true brand-builder.”

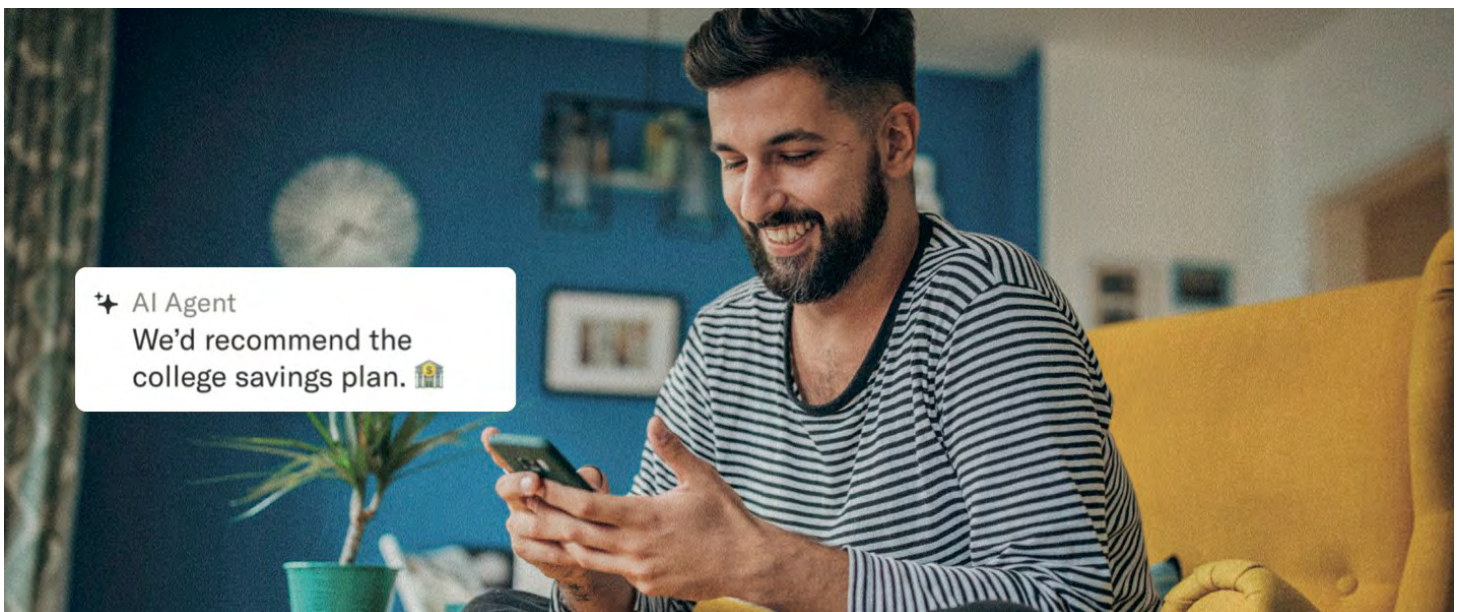
### Final Thoughts

Customer experience is at an inflection point. Rising expectations, economic pressures, and technological advances have created both urgency and opportunity. Those who embrace AI thoughtfully will thrive.



Sierra helps businesses build better, more human customer experiences with AI.

Learn more at [sierra.ai](https://sierra.ai)

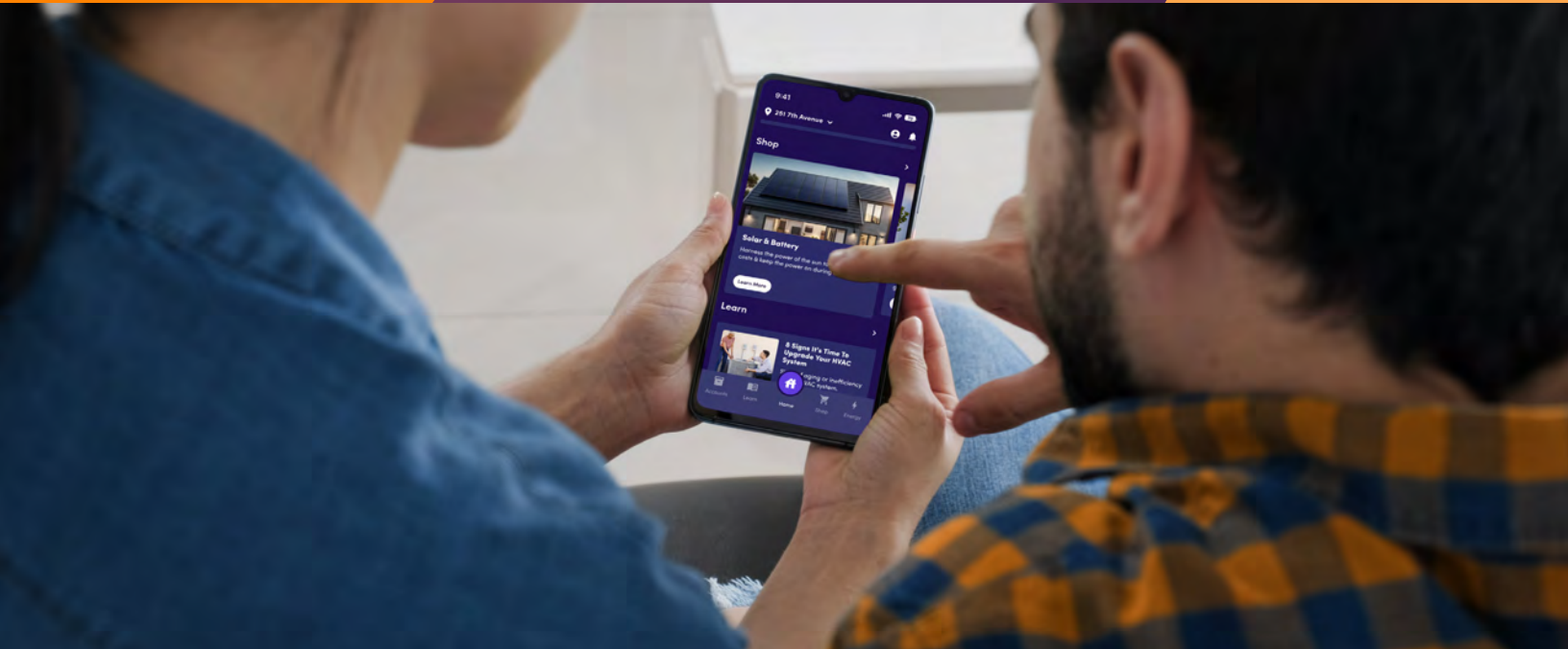






# BRAND SPOTLIGHT

## GoodLeap



## Building Simplicity at Scale: How GoodLeap Delivers Operational Excellence Through Innovation

Inside GoodLeap's mission to build smarter, simpler, and more sustainable customer experiences powered by intelligent operations.



**Paul Brandt**  
Chief Operations Officer



At [GoodLeap](#), technology is more than a tool; it's a force for good. As a leading provider of best-in-class financing and software products for sustainable home solutions, GoodLeap has helped more than one million homeowners make energy-efficient upgrades, from solar panels and heat pumps to roofing and smart windows, through a simple, fast, and frictionless digital experience.

Since 2018, the company's platform has enabled over \$30 billion in financing for sustainable products, empowering both homeowners and the thousands of professionals who rely on GoodLeap's artificial intelligence (AI)-powered applications to streamline communication, operations, and payments.

Guiding this mission is [Paul Brandt](#), Chief Operations Officer and Execs In The Know [advisory board member](#), who leads the teams responsible for customer service, underwriting, installer relations, auditing, and more. Under his direction, GoodLeap has strengthened its reputation for operational excellence, creating experiences that are reliable, scalable, and deeply human.

Brandt also spearheaded the company's first generative AI capabilities, deploying cutting-edge technology that has increased operational productivity by more than 40%, empowered internal teams with real-time co-pilot tools, and enhanced customer-facing support.

Together, Paul and GoodLeap are proving that innovation and empathy are not opposites; they're the foundation of a business built to last.

**Execs In The Know (EITK): You've led customer experience and operations across energy, tech, airlines, and hospitality. What lessons from these different industries most influence how you lead GoodLeap today?**



#### **Paul Brandt:**

I've had the good fortune to work at some truly great companies across different industries. And what I've seen over my career is that it doesn't really matter what industry you're in. All customers have basic expectations that they want met, regardless of what or who they're dealing with. Things like empathy, a willingness to act, empowered and helpful agents, not being passed around from one group to another, and acting with a sense of urgency, etc. It's important to remember that we're all customers in our everyday lives, whether we're going out to eat at a restaurant, shopping, or visiting the pharmacy.

I know how I want to be treated and how I want my loved ones to be treated, so why should I expect it to be any different for our customers? Our team members need to always keep this foundational principle top of mind and never treat any customer interaction as "just another call/text/chat/email." It's not, and thus, they model the behavior and helpfulness they would expect and want for themselves or a loved one.



**Purpose drives culture, culture drives engagement, and highly engaged employees deliver results.**

**EITK: You've called yourself a "CX junkie." What does that mean to you, and how has that passion shaped your approach to operational excellence?**

**Paul:** So many of our experiences nowadays are based on a commodity-like economy. Products or services that are very similar and even priced alike. So, one of the best ways to differentiate yourself from the competition is by being a recognized leader in CX. Be that "go to" place where customers are actively promoting your business on your behalf because of the extraordinary service they've been provided. Find ways to surprise and delight your customers. I believe in sweating the small stuff.

The "little things" matter and matter a lot. For example, something as basic as a friendly smile and listening deeply costs nothing, but can make a big difference in a customer's day and perception of your brand. Being operationally excellent is the foundation for enabling a phenomenal customer experience. You have to have systems, policies, and procedures in place that allow your teams to deliver on your promise to your customers. Suppose you're not meeting these basic operational requirements (answering the phone promptly, etc.). In that case, you're starting from a negative, making it that much harder to ensure your customers are completely and fully satisfied.

**EITK: Your mantra is "Purpose drives culture, culture drives engagement." Can you share a time when clarifying purpose directly improved employee engagement or customer results?**

**Paul:** I truly believe in the following chain: "Purpose and mission drives culture, culture drives engagement, highly engaged employees deliver results." It's been proven time after time. Culture can be difficult to define. Ask 10 people and you'll probably get 10 different answers. And they all could be right! We all "own" the culture that we're a part of at our places of employment. I tend to simplify things, and I think of culture as a group of people coming together under a shared set of values, working for a common goal. People have an innate desire to serve a higher purpose.







**EITK: With responsibilities from underwriting to O&M, how do you identify where technology and process improvements will have the greatest CX impact?**

**Paul:** We have an amazing engineering team at GoodLeap. They're the best I've ever been around. Coupling that with a mindset of innovation and continuous improvement gives us a set of almost endless opportunities. We continue to build on top of our already-deployed innovative agentic artificial intelligence (AI) solution, DeDe. DeDe not only provides proactive insights, but it also allows for actions to be taken (so it's not just an "information only" bot). DeDe is always there, so it makes GoodLeap a true 24x7x365 operation. Employees also make use of DeDe, offering an easy-to-use internal support system.

**EITK: GoodLeap aims to create an experience that's easy, intuitive, and fast. What metrics or signals tell you you're achieving that goal?**

**Paul:** We're a very data-driven organization, but the topline metric we use for our overall customer experience is Net Promoter Score (NPS). We measure at key moments across the customer journey (both from an end-consumer perspective and from a B2B perspective). To date, we've received over 600k completed surveys, rich with insights directly from our customers.

We use these insights to filter back to our internal teams for continuous improvement. Our Product Management team will also use the data to help inform future product enhancements and features. Operational teams can enhance standard operating procedures (SOPs) and training based on the feedback.



**Being operationally excellent is the foundation for a phenomenal customer experience. You can't deliver delight if you don't deliver the basics.**



**EITK: Can you share an example of a change that produced immediate customer benefits while also laying the groundwork for sustainable growth?**

**Paul:** When I first started with GoodLeap, we were solely focused on enabling solar solutions for customers. However, over three years ago, we diversified our offerings to include other home efficiency solutions, such as high-efficiency HVAC, roofing, doors and windows, artificial turf, water efficiency, and other home improvement products.

This has been a huge area of year-over-year growth for our business, with many more years of growth ahead. From a customer's perspective, they now have a "one-stop solution" for all their home improvement needs.

**EITK: For peers leading operations and CX in today's rapidly changing environment, what's one practice or mindset you believe separates good from truly great companies?**

**Paul:** As you grow in your career and climb the corporate ladder, don't let yourself get too disconnected from your teams or the customer. What better way to truly understand the employee experience (EX) and the customer experience (CX) than by continuing to participate in calibration sessions, handling an escalation yourself, using the same tools your agents are using, etc.?

Obviously, with increased responsibilities, these tasks are no longer part of your day-to-day routine, but you can be intentional and set some time aside to do them every week. If you truly believe these things (the EX and CX) are important, then you'll make time to stay engaged. Depending on the product or service your company offers, actively engage as a customer and interact with your business in the same way your customers do.

**EITK: Is there a brand that consistently impresses you as a customer, and what do you take from those experiences into your own work?**

**Paul:** Chick-fil-A is always used as an example, and there's a good reason for that. Their restaurants are always clean, the food is good, it's priced competitively and considered a good value, it's delivered quickly, and the employees are always friendly and helpful. What a contrast to so many other quick service restaurant brands, where you too often experience the opposite. This is what has made Chick-fil-A the envy of the Franchise world, where it far exceeds its competition in average sales per location and other key metrics.

They excel at these things consistently across their network, like good food, cleanliness, and helpful, friendly staff, ensuring basic customer expectations are always met (and usually exceeded). This falls back to the concept that if you disregard focusing on "the basics" or the small things, nothing else really matters. Start with "the basics" and everything else will be a cherry on top.





**EITK: Who has been the most influential mentor or colleague in shaping your CX philosophy, and what lesson from them do you still lean on today?**

**Paul:** I've been blessed to have several influential mentors throughout my career. I've learned, and continue to learn, from all of them. Their wisdom, guidance, and counsel are something that I cherish deeply and am extremely grateful for. During my time at Southwest Airlines, I was fortunate to get to know both Herb Kelleher and Colleen Barret. Two larger-than-life individuals who have shaped the global modern airline industry.

I co-chaired the quarterly Customer Experience Council at Southwest Airlines with Colleen. At this time in her career, she was "retired," which I say loosely because she still held a significant presence at HQ and remained involved in many aspects of the operation, including co-chairing this council. I was always amazed at her passion and her ability to be very direct, yet always respectful, while still cutting right to the point (no beating around the bush).

This is an interpersonal skill that is not easy to achieve, and she was a master at it. The point is that you can be direct, tough, and firm, but you can do that in a manner that is respectful, positive, and drives the behavior and thus results you're looking for.

**EITK: In your everyday life, how do you personally "sweat the small stuff" when it comes to delivering great service, whether at work, at home, or in your community?**

**Paul:** We've become super distracted as a society. If something can't be conveyed in six seconds or less, we've lost the ability to focus or engage. We hold the power of all the world's information available in the palm of our hand. Too often, this interferes with our interactions with others.

**We're building on top of our agentic AI solution, DeDe, which doesn't just deliver insights — it takes action. That's what makes GoodLeap a true 24x7x365 operation.**

Being present and fully engaged with those that you're interacting with is the best way to serve them. What does that look like in real life? One of the "small things" I've done to help me be more present and engaged is that I've been training myself to let go of being tethered to this device (phone) all the time. When I am at dinner with others, I leave my phone behind or turn it off. When I'm having a conversation with a co-worker, friend, or family member, I put my phone away and place it in "Do Not Disturb" mode. It sounds simple, and it is, but we've become so dependent on our phones that it needs intentionality to put it into practice.

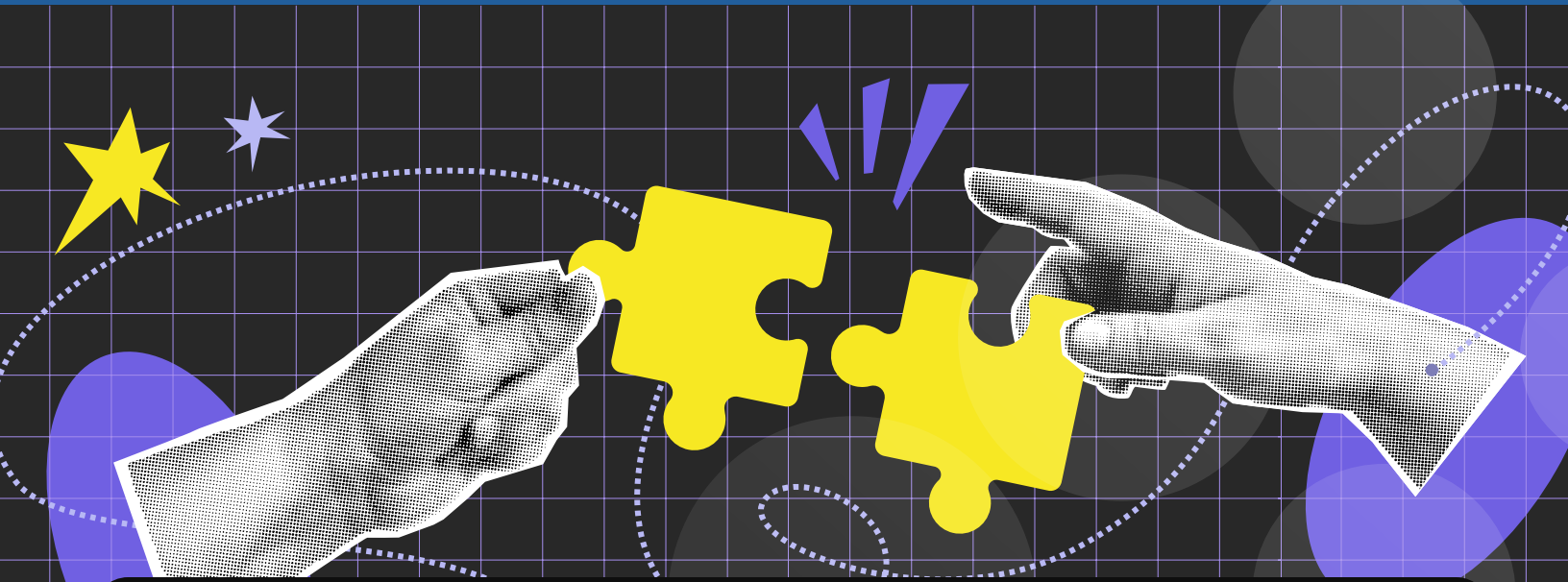


## Execs In The Know

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

Thank you to Paul Brandt and the GoodLeap team for contributing to this Execs In The Know Brand Spotlight.

Interested in taking part in a future Brand Spotlight feature and sharing your story? Contact our Director of Content & Marketing at [elysia@execsintheknow.com](mailto:elysia@execsintheknow.com).



# How Back-Office Operations Contribute to Customer Experience Improvements

Back-office functions are often invisible but critical to CX success. Learn how to bridge silos, elevate operational voices, and turn behind-the-scenes work into a driver of satisfaction, loyalty, and growth.

by Execs In The Know

One of the biggest obstacles to delivering seamless end-to-end customer experience (CX) is the persistence of organizational silos where departments are isolated from shared information and goals. This is common due to traditional function-based organizational structures.

Execs In The Know recognizes this challenge and addresses it in a recent report, in partnership with NiCE, titled *CX Without Silos: Bridging Front- and Back-Office Operations to Elevate CX*. The report draws on a 35-question survey of nearly 50 CX leaders and reveals a growing disconnect: while back-office operations play a crucial role in CX, they often lack visibility in executive decision-making.<sup>1</sup> By examining the pain points, operational realities, and emerging opportunities within the back office, the report provides a more comprehensive understanding of how these functions impact the broader customer journey. This article advances that conversation, focusing on how back-office operations shape CX and ways these silos can be broken down to deliver better experiences and unlock value across the organization.



## The Challenge Landscape

Of the many key research findings, one insight revealed a paradox that highlights an untapped opportunity. Despite 63% of CX leaders rating back-office performance as "Good" or "Very Good," nearly half report that investment in these operations is low. This disconnect reveals a critical blind spot: back-office functions are delivering value but remain underfunded and underprioritized. This limits their potential positive impact on the end-to-end CX as well as having a ripple effect on the employee experience, particularly for frontline staff.

A second important insight relates to an organizational blind spot: only 20% of CX leaders believe their C-Suite understands back-office operations. This finding may suggest a gap between executive decision-making and the operational realities that shape customer and employee outcomes. Such a disconnect can lead to strategies that appear effective on paper but are impractical or unsustainable in practice. On a positive note, this learning identifies a leadership opportunity: bridging the gap between the boardroom and back-office could unlock transformative improvements in both customer and employee experience.

The study also revealed a potential hidden impact on CX. Frontline teams typically are held accountable for customer satisfaction (CSAT) scores (whether good or not so good), but back-office functions like claims processing, billing, and order fulfillment often have an outsized impact on whether scores rise or fall. Back-office functions play a critical role in the end-to-end customer journey, and these teams should have a thorough understanding of their impact and visibility into pain points, solutions, and overall measurement scores.

In addition to knowledge and visibility, the research uncovered a measurement gap for back-office teams. Unlike front-office scorecards that focus on the efficiency and effectiveness of customer interactions, back-office key performance indicators (KPIs) monitor the operational health of the department. These scorecards generally are focused on measuring internal efficiency, productivity, quality, and accuracy. Without unified and standardized KPIs, the value of back-office operations to CX is challenging to prove, leaving leaders struggling to secure budget and visibility.



## The Success Path

The report reveals a powerful opportunity for CX leaders: bridge the longstanding divide between frontline and back-office operations. What may appear as persistent challenges are actually solvable friction points waiting for intentional action. The study poses a critical question: How can leaders enhance cross-functional alignment, inform more informed investment decisions, and achieve better outcomes for both employees and customers? CX leadership should reimagine operational collaboration, elevate the visibility

of back-office contributions, and unlock a more unified end-to-end experience.

Like many solutions, this transformation starts with education and awareness. Helping the C-Suite and back-office peer leaders understand the strategic role of operations in delivering seamless CX is job one. Back-office work must be reframed – not just as support tasks, but as drivers of revenue, retention, and satisfaction. This reframing is a crucial step in sparking a change in mindset.

Consider these actionable ways to jumpstart education and awareness efforts:

- ✓ **Communicate:** Create briefing sessions, executive dashboards, and other vehicles that show how back-office performance influences key CX metrics (e.g., resolution times, CSAT, churn).
- ✓ **Tell a Story:** Use real customer and employee stories of friction points tied to back-office breakdowns. These voices will help bring struggles to life and motivate change.
- ✓ **Celebrate:** Highlight moments where back-office improvements led to CX wins, cost savings, and other successes to show progress and the results of collaboration.

Once that mindset shift occurs, leaders can begin to see back-office excellence as a source of competitive advantage. Operational efficiency directly influences customer loyalty; billing accuracy, claims processing, account adjustments, and fulfillment speed all shape whether a customer's experience feels effortless or frustrating. Elevating awareness also opens the door to investment in tools, training, and process redesign that improve customer and employee experiences.

As awareness of the back office's critical role in shaping customer and employee experiences increases, it's equally important to ensure their voices are actively included in CX strategy

development. **Elevating back-office voices in CX strategy** is crucial for setting clear expectations and achieving the desired outcomes.

Creating more cross-functional visibility and collaboration enables back-office teams not only to stay informed about CX priorities but also to contribute to them in meaningful ways. When these teams are engaged early and often, their insights can help identify process gaps, improve handoffs, and accelerate problem resolution, ultimately driving better outcomes for both customers and employees.



Some actions to elevate back-office voices in CX strategy include:



**Involve:** Back-office leaders bring deep operational insight into the systems, workflows, and processes that directly shape customer outcomes, but typically behind the scenes. To ensure experience transformation efforts are grounded in operational reality, CX leaders should actively involve these peers early in the process by seeking their input, surfacing pain points, and co-designing solutions.



**Empower:** Create structured channels for back-office teams to share insights, raise red flags, and contribute improvement ideas. Go beyond collection: establish a closed-loop feedback process that acknowledges contributions, follows up on actions taken, and fosters collaboration. This builds confidence in the new operating model and strengthens trust between teams.



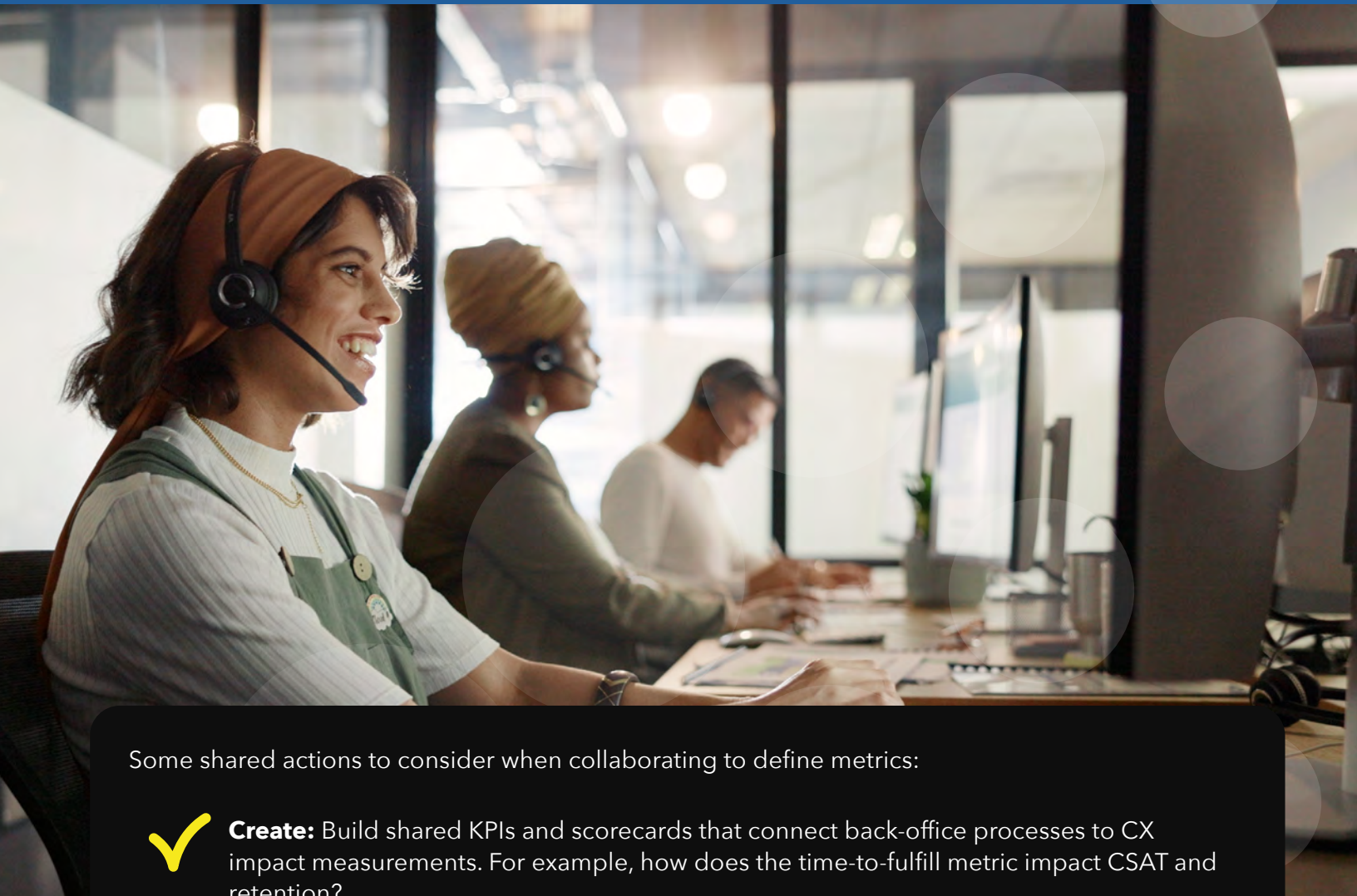
**Govern:** Form CX governance councils or "CX Without Silos" task forces that include cross-functional representation – not just from customer-facing teams, but from all departments that impact the customer experience, directly and indirectly. This shared ownership model ensures better alignment, faster decision-making, and a unified approach to delivering the end-to-end experience.

As back-office functions become more integrated into CX strategy development, they should also play an active role in **defining the metrics** that connect their work to broader business outcomes. When frontline and back-office leaders collaborate around shared CX metrics, silos give way to joint accountability. The conversation shifts from "keeping the lights on" to "fueling growth," taking advantage of all parties at the strategy table. This alignment empowers organizations to innovate, break down bottlenecks, and deliver seamless customer journeys while reducing internal friction for employees.

Translating operational metrics into a language the C-Suite cares about is essential. Instead of presenting isolated process data, frame it in terms of outcomes leaders prioritize: efficiency, scalability, CSAT, and return on investment (ROI). By aligning operational insights with strategic business drivers, back-office efforts become visible not just as support activities but as key enablers of growth and competitive advantage.

Another critical step is building a compelling case around CX-focused metrics, such as CSAT, Net Promoter Score (NPS), effort, and retention. When operational improvements can be tied to rising CX scores, they become far more persuasive as strategic investments rather than tactical tweaks.





Some shared actions to consider when collaborating to define metrics:

- ✓ **Create:** Build shared KPIs and scorecards that connect back-office processes to CX impact measurements. For example, how does the time-to-fulfill metric impact CSAT and retention?
- ✓ **Report:** Keep teams at all levels of the organization informed about progress. Sharing scorecards and insights supports transparency, decision-making, and continuous improvement across teams and the organization.
- ✓ **Align:** Include back-office leaders in the design and execution of quarterly business reviews and CX planning. These leaders are part of the program, not just audience members receiving the reports.

Increasing collaboration and reporting on improvements and opportunities is an excellent precursor to **advocating for investment and modernization** for back-office systems. Many brands struggle with outdated systems; in fact, 47% of CX leaders indicate the current level of investment in their back-office operations are either “Low” or “Very Low” compared to 17% who indicate “High” or “Very High.”<sup>2</sup> When senior leadership understands the stakes, they are more likely to approve investments in technology that improve back-office performance.



To tell a convincing story of how investment can improve CX, leaders should consider these actions:

- ✓ **Document:** Build a business case that quantifies how underinvestment in the back-office degrades CX. This may result from slow resolution, increased handle time, or creating new frustrations for customers and employees.
- ✓ **Highlight:** Make sure the business case shows how modernizing back-office systems improves KPIs and delivers an ROI. Consider the positive impact on both customers and employees. Chances are that agent experience, employee retention, CX consistency, and other internal metrics will also improve dramatically as a result of the investment.
- ✓ **Update:** Keep track of how KPIs and operations evolve, so the story remains fresh and up-to-date. A monthly or quarterly refresh of the data and results will help communicate the impact of investing (or not) in critical behind-the-scenes systems.

As considerations are made for what tools to invest in to **increase collaboration, efficiency and performance, artificial intelligence (AI)** should top the list. Leaders repeatedly identify AI implementation and automation as an area for growth. According to Gartner, "by 2028, 33% of enterprise software applications will include agentic AI, up from less than one percent in 2024, enabling 15% of day-to-day work decisions to be made autonomously."<sup>3</sup> Organizations can greatly benefit from AI-driven systems that link departments to break down silos and power seamless collaboration. AI is a unifier; it can connect data, workflows, and insights and help orchestrate end-to-end processes, improving the customer and employee experience. These improvements may include lowering resolution time, reducing manual tasks, cutting costs, and/or replacing some back-office roles.



An actionable approach for using AI in back-office operations include:

- ✓ **Identify:** When introducing or expanding AI capabilities, organizations should select the most impactful use cases and align their technology selection and goals accordingly. For example, agentic AI can orchestrate and monitor handoffs between teams, enabling end-to-end visibility and accountability.
- ✓ **Partner:** CX and back-office leaders should work closely with IT business partners and outside firms (if needed) to understand the requirements for compatibility with existing systems.
- ✓ **Protect:** Leaders should also address governance, risk, and compliance. Key questions about AI explainability, data access, and handling must be surfaced and addressed as plans are made for selection and deployment.

## A More Collaborative Future

One of the most common challenges CX leaders face is working across siloed organizations to improve the end-to-end experience for customers and employees. Breaking down these silos to deliver better experiences and unlock value across the organization is no small feat. In addition, leaders often face low or no investment in seemingly invisible functions, such as back-office operations. They may be unsure about how to approach senior leadership for budget allocation.

Leaders have a variety of options to increase back-office contributions to the customer and employee experience. One starting point is managing up using education and awareness campaigns to help executives and peer leaders recognize the back office as a strategic lever, not just a support function. Equally important is **elevating back-office voices** in CX strategy discussions, ensuring that the people closest to operational processes have a significant influence in shaping the customer journey.

Another critical step is collaboration around metrics. By working closely with back-office peers to identify and define the measures that matter, leaders can better capture the impact of operations on end-to-end CX. This clarity not only strengthens cross-functional alignment but also provides a compelling case for investment and modernization, demonstrating how back-office performance impacts CSAT, NPS, loyalty and, ultimately, revenue.

Finally, leaders should **prioritize AI integration in the back office**. While education and metrics set the stage, the adoption of AI-powered solutions offers the most transformative opportunity. When implemented thoughtfully, AI doesn't just streamline processes; it empowers employees, reduces errors, and creates more consistent and proactive experiences for customers.

Ultimately, reframing the back office is about reimagining its role in the enterprise value chain.

With the proper visibility, governance, and cross-functional collaboration, back-office operations can evolve from hidden cost centers into powerful engines of satisfaction, loyalty, and long-term growth.

## In luxury retail, precision and consistency are everything. How do you ensure that back-office functions like fulfillment or returns align with the elevated brand experience customers expect from Michael Kors?

"At Michael Kors, we recognize that every customer interaction, whether customer-facing or behind the scenes, must reflect the brand's commitment to luxury, quality, and care. Our back office operations play a pivotal role in delivering a seamless and elevated experience, especially in areas like warranty support, which directly impact customer trust and satisfaction. Historically, our warranty process was multi-layered, convoluted, and time-intensive, often leading to customer frustration. Recognizing this, we partnered closely with our back-office support team to reimagine the entire journey. Today, our process is streamlined, responsive, and customer-centric:

- **Real-Time Decisioning:** Customers now submit images of their defects digitally, allowing our team to assess and resolve claims without requiring physical inspection of the product and adding time to the warranty process. This not only speeds up resolution but also respects the customer's time and effort.
- **Empowered Choice:** Instead of offering limited replacement options to choose from for their defective product, we issue gift cards equivalent to the original purchase value. This empowers customers to select a replacement that truly suits their style—online or in-store—reinforcing the personalized luxury experience they expect from Michael Kors.
- **Direct Repair Routing:** For repairable items, customers now send products directly to our repair center, eliminating unnecessary steps and reducing turnaround time by 7-10 days. They're also provided with realtime status tracking of their repair.
- **Proactive Quality Feedback Loop:** Our back-office team compiles monthly defect data and photos, sharing these insights and trends with our Production team, who in turn partner with the factories to prevent future defects. This feedback has led to tangible improvements in product quality and a reduction in recurring defects—ensuring future collections meet the highest standards of craftsmanship. By integrating our back-office functions into the broader CX strategy, we've not only enhanced operational efficiency but also elevated the emotional experience of our customers. Every touchpoint—from claim submission to resolution—now reflects the care, attention to detail, and consistency that define the Michael Kors brand."

Ebrahim Hyder  
Vice President, Customer Service  
Michael Kors

## Article Links

1. <https://execsintheknow.com/cx-without-silos-bridging-front-and-back-office-operations-to-elevate-cx/>
2. <https://execsintheknow.com/cx-without-silos-bridging-front-and-back-office-operations-to-elevate-cx/>
3. <https://www.gartner.com/en/articles/intelligent-agent-in-ai>





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# AI Can't Fix Bad Knowledge: How Governance Shapes Customer Service

Knowledge governance is essential for AI to deliver consistent, accurate, and compliant CX.

*by Sarah Jeanneault, VP Marketing at ProcedureFlow*

Artificial intelligence is redefining the contact center, promising better service, lower costs, and more productive employees. One obstacle consistently undermines these benefits: the quality of the knowledge AI relies on. Without knowledge governance, AI amplifies errors, spreads inconsistency, and increases compliance risks. For AI investments to succeed, organizations need to establish foundational elements like a [knowledge governance strategy](#)<sup>1</sup> to ensure information is accurate, up to date, and scalable.



## The AI Hype Meets the Knowledge Gap

Generative AI has captured the attention of customer experience leaders worldwide. Chatbots, intelligent assistants, and real-time coaching tools are being deployed at unprecedented speed. But beneath the excitement lies a harsh reality: AI is only as effective as the foundation it's built on.

When knowledge is outdated, fragmented, or siloed, AI does not solve problems; it magnifies them. Agents and customers receive conflicting answers, compliance lapses occur, and trust erodes. The gap between expectations and reality is already visible by [CMS Wire](#):<sup>2</sup> while "extensive" use of AI in CX nearly tripled in the past year (from 11% to 32%), 16% of leaders now report AI has little to no impact on customer experience, up sharply from four percent a year ago. This makes it clear that poor inputs inevitably produce poor outputs, regardless of technological sophistication.

A [Veritas report](#)<sup>3</sup> underscores this point, revealing that 45% of leaders say poor data management prevents them from leveraging emerging technologies like generative AI. Organizations that underestimate this risk often find that AI projects fall short of expectations, delivering operational headaches rather than transformative improvements.

## The Foundation of Governance

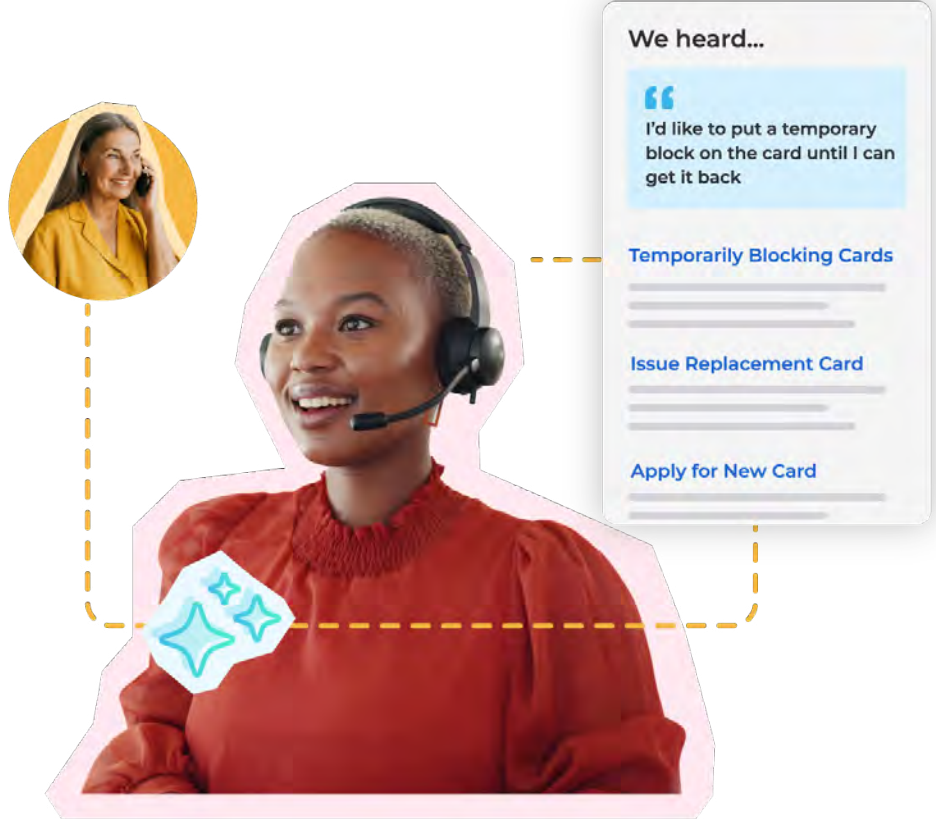
[Knowledge governance](#) provides the structure AI requires.<sup>4</sup> It is a deliberate framework that ensures information is accurate, compliant, and aligned with organizational objectives. At its core, governance means that there is established responsibility for content creation and maintenance, review processes are defined, and standards are set for accuracy, accessibility, and accountability.

This structure matters because organizations consistently rank siloed systems (28%), fragmented

data (26%), and governance gaps (26%) among their top CX challenges. Without governance, critical knowledge quickly becomes outdated, such as:

- Policy updates (e.g., healthcare or financial regulations).
- Product and service details (pricing changes, new eligibility rules, technical specifications).
- Customer-facing processes (escalation paths, onboarding steps, troubleshooting guides).

Governance builds confidence among agents who rely on accurate knowledge in real-time, supports leaders in mitigating compliance risks, and assures customers that they receive consistent, trustworthy information. It also reduces hidden costs associated with rework, escalations, and turnover. No surprise, then, that 25% of organizations now list "digital governance and content quality" as a top investment priority.



# Knowledge Governance Framework



## The Risks of Poor Knowledge

The absence of governance carries tangible consequences. Knowledge becomes scattered across multiple systems, expert insights go uncaptured, and outdated processes persist unchecked. This issue is only set to intensify as by 2030, 61 million baby boomers will exit the workforce, risking a massive loss of expertise and widening skill gaps.

The financial stakes are significant. [Gartner<sup>5</sup>](#) estimates that poor data quality costs organizations an average of \$12.9 million annually. Compounding the problem, MIT reports that 95% of organizations are seeing zero return on their \$40 billion investments in generative AI, and Veritas finds that nearly 77% of corporate knowledge is redundant, obsolete, or trivial – precisely the type of unreliable information that causes AI systems to generate errors.

CX leaders also recognize the risks: 49% cite data privacy, 42% cybersecurity, and 31% IP protection as their top concerns when deploying generative AI. The result is more than just wasted spend; it decreases agent confidence and erodes customer trust. Agents struggle to navigate conflicting information, which fuels burnout and, ultimately, poor customer satisfaction and loyalty.

## Knowledge and the Human Factor

The human element of knowledge is critical to both employee experience and customer outcomes. Ninety percent of CX leaders agree that employee digital experience directly impacts customer experience. When agents lack governed, reliable information, they face the leading causes of frustration: outdated policies, unclear processes, or conflicting answers across systems.

CX leaders know exactly what employees need:

- Collaboration tools (39%)
- Easy access to customer data (36%)
- Easy access to product/service info (34%)

AI can handle routine inquiries, but the nuances of empathy, judgment, and complex problem-solving remain uniquely human. Governed knowledge ensures employees are equipped with reliable information so they can focus on higher-value interactions.

With confidence in their tools, employees deliver more accurate, empathetic service, reducing turnover and increasing customer satisfaction – [turning AI into a true complement<sup>6</sup>](#) rather than a competitor.



## A Framework for Governance

Effective knowledge governance is not a one-time initiative but an ongoing discipline that requires careful planning, continuous monitoring, and adaptation. Organizations that succeed in implementing a framework follow a deliberate path that ensures both human agents and AI have access to accurate, timely, and actionable knowledge.

**1. Assess the current state of knowledge.** Conduct a knowledge audit to pinpoint gaps, redundancies, and outdated information across systems and repositories.

- Outdated content examples: expired promotions, obsolete troubleshooting steps, discontinued product manuals, or escalation paths tied to retired roles.
- Critical knowledge at risk: compliance rules, billing procedures, claims handling, onboarding checklists, or scripts used during customer interactions.

## 3. Establish clear roles and responsibilities.

Assign ownership for content creation, updates, and approvals. For instance, product teams should maintain feature documentation, compliance teams oversee policy updates, and operations leaders ensure processes are accurate. Without ownership, outdated or conflicting knowledge lingers and erodes trust.

## 4. Set objectives and performance metrics.

Translate governance into measurable outcomes. Common goals include:

- Reducing escalations caused by inaccurate information
- Improving first-contact resolution rates
- Increasing employee confidence in knowledge systems
- Ensuring regular review cycles (e.g., every 90 days for regulated content)

**\$12.9M**

is lost by organizations annually due to poor data quality

Stat from Gartner

**77%**

of the average US company's knowledge is redundant, obsolete or trivial

Stat from Veritas

**95%**

of organizations are seeing zero return on their \$40 billion investments in GenAI

Stat from MIT

**61M**

baby boomers will exit the workforce, risking a massive loss of expertise

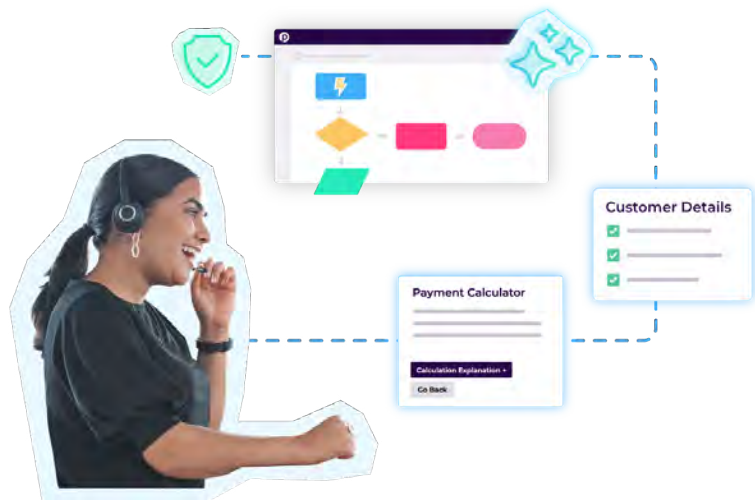
Stat from National Institutes of Health

**2. Develop a content strategy aligned with organizational goals.** Define which types of knowledge are critical, how content should be structured, and who maintains it.

- Customer-facing knowledge: Product features, pricing structures, and self-service articles.
- Operational knowledge: Call handling protocols, escalation procedures, process flows for onboarding or billing.
- Regulatory knowledge: Healthcare policies, financial reporting requirements, or security and data-handling procedures.

**5. Commit to continuous improvement.** Knowledge must evolve alongside the business. As products, services, or policies change, updates must flow quickly into customer-facing and internal knowledge. For example, retail teams must refresh seasonal return policies, insurers must reflect new eligibility criteria, and utilities must update outage protocols.

By following this structured approach, organizations ensure that both AI and human agents always have access to the most reliable version of critical knowledge.



## Preparing for the Future of CX

The question for contact centers is no longer whether to adopt AI, but whether they are ready foundationally and strategically to ensure it is successful. AI cannot create accuracy where none exists; it only amplifies the quality of the information it consumes.

Knowledge governance provides the foundation for AI to deliver on its promise. It ensures accuracy, reduces risk, and gives employees the confidence to perform at their best. By prioritizing governance today, organizations move beyond hype and build a sustainable, AI-enabled future for customer experience.

Technology alone will not guarantee success. Organizations that treat knowledge as an afterthought risk undermining the very tools they hope will deliver value. Those that put governance at the center achieve lasting improvements: faster onboarding, higher customer satisfaction, stronger compliance, and better agent performance.

By embedding governance into their AI strategy, organizations can scale technology responsibly. As AI capabilities advance, both people and systems stay aligned, delivering consistent, high-quality customer service at every interaction.

## Article Links

1. [https://solutions.procedureflow.com/knowledge-governance-infographic?utm\\_source=industry\\_mag&utm\\_medium=referral&utm\\_campaign=cx\\_magazine\\_2025](https://solutions.procedureflow.com/knowledge-governance-infographic?utm_source=industry_mag&utm_medium=referral&utm_campaign=cx_magazine_2025)
2. <https://www2.cmswire.com/cp-smg-dcx-report-cx.html>
3. [https://www.veritas.com/content/dam/Veritas/docs/other-resources/behaviors\\_and\\_attitudes\\_of\\_it\\_leaders\\_toward\\_organizational\\_approach\\_to\\_data\\_management.pdf](https://www.veritas.com/content/dam/Veritas/docs/other-resources/behaviors_and_attitudes_of_it_leaders_toward_organizational_approach_to_data_management.pdf)
4. [https://procedureflow.com/product/knowledge-governance?utm\\_source=pdf&utm\\_medium=pdf&utm\\_campaign=cx\\_magazine\\_2025](https://procedureflow.com/product/knowledge-governance?utm_source=pdf&utm_medium=pdf&utm_campaign=cx_magazine_2025)
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**Sarah Jeanneault**  
VP Marketing

Sarah Jeanneault brings over 20 years of experience leading growth-focused strategies and building customer-centric ecosystems that drive revenue, strengthen engagement, and increase long-term value. She has guided teams across startups and enterprises to achieve multi-million-dollar growth. Sarah's work has appeared in Forbes.com and Yahoo Finance, where she shares insights on business strategy and CX industry insights.



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- **33%** have already abandoned a company because of its DEI stance.

CX leaders can find these and other strategically critical findings in the 2025 *CX Leaders Trends & Insights: Consumer Edition* report.



**DOWNLOAD THE FULL REPORT**







# Are You Measuring CSAT for AI?

As AI becomes the face of more customer interactions, a critical question emerges: How satisfied are customers with their AI experiences, and are companies even measuring it?

by Execs In The Know

Artificial intelligence (AI) has shifted from a back-office enabler to the frontline. Whether it's through virtual assistants, chatbots, or intelligent routing systems, AI is now a significant part of how customers experience a brand.

But as these touch points scale, a key question emerges: Are we measuring the quality of those experiences in a way that reflects their growing impact?

Customer satisfaction (CSAT) has long served as a guiding metric in service organizations. Yet many companies still assess it primarily through human-assisted interactions: calls, chats, or emails handled by agents. In contrast, AI-led interactions often fall outside the measurement framework. Not because leaders are neglecting them, but because the methodology is still catching up to the moment.

This isn't a matter of right or wrong. It's a reflection of where many brands find themselves: navigating new ground, exploring how to measure value in emerging digital channels, and asking the right questions along the way.



## Rethinking What “Good” Looks Like

When AI was first introduced to customer experience (CX), its success was largely defined by operational wins, including reduced handle time, containment rates, and cost savings. These metrics are still important, but they tell only part of the story. A system can be efficient and still fail to meet customer expectations.

Measuring CSAT for AI isn't about checking a compliance box. It's about creating a fuller view of experience, one that includes emotion, effort, and trust. And there's no single playbook for how to do that. Some organizations are experimenting with post-interaction surveys specific to AI. Others are exploring conversation analytics, open-text insights, and sentiment data as proxies for satisfaction.

The takeaway? Quality can be measured in many ways. What matters most is having a system in place that allows you to listen, learn, and iterate.



Legacy metrics like CSAT and net promoter score (NPS) were built for a different era, one where human interactions dominated and surveys captured the bulk of feedback. But as AI takes over routine tasks and reshapes the contact mix, these tools are starting to show their limitations. [According to CX Today](#),<sup>1</sup> analysts are calling for a new generation of metrics.

Predictive tools like expected NPS (xNPS) allow AI to estimate how satisfied a customer likely is, even without a survey response. Platforms like Salesforce are rolling out “Customer Success Scores” to flag where friction exists and where teams can take action before the customer even complains. It's a shift from static scoring to dynamic insight, and it reflects a broader truth: you can't optimize what you're not measuring, and you can't measure AI the same way you measure a person.

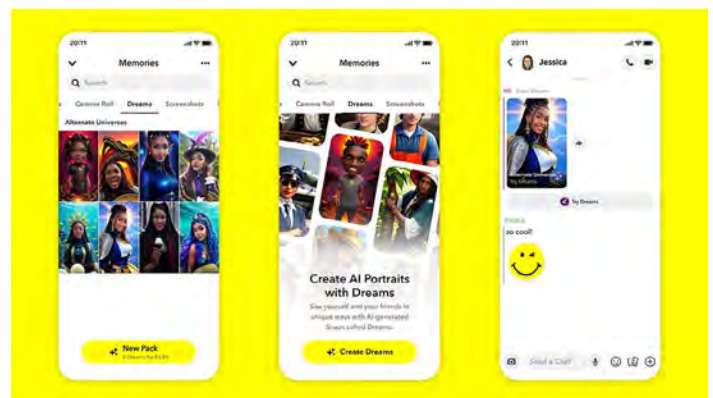
## Why Measurement Matters, Even If It Looks Different

Customer expectations around AI are rising. In 2023, many customers were curious. In 2025, they're discerning. They know when they're interacting with AI, and they have a sense of what “good” should feel like, whether that means speed, clarity, or a graceful escalation to a human.

This evolution creates both opportunity and pressure. If AI is the first point of contact, then it's also the first impression. Measuring the experience isn't just about accountability. It's about influence and understanding how AI shapes perceptions of your brand.

Some brands now apply CSAT in the same way across all channels, including AI. Others take a more differentiated approach. What's consistent across high-performing organizations is a commitment to insight: finding ways to hear the customer, however the interaction unfolds.

When AI experiences are implemented without considering customer perception or measuring satisfaction, the consequences can be swift and severe. Take Snapchat's 2023 launch of My AI, a generative chatbot pinned to the top of users' chat feeds. Rather than delighting users, the unremovable feature sparked backlash, with many describing it as invasive or unsettling. App store ratings plummeted, and searches for “delete Snapchat” surged by nearly 500% in the months following the release.



The problem wasn't just the presence of AI; it was the absence of customer insight guiding the implementation. As [Harvard Business Review](#)<sup>2</sup> points out, assuming AI will automatically add value without listening to users can erode brand trust and trigger reputational damage. Measuring how AI is experienced is essential not just for optimization but for risk mitigation.



For our chatbot, we look at how many customers self-served and were contained within our Chatbot solution. We also look at the thumbs up and thumbs down feedback we receive from our customers on their chatbot experience to determine what trends we are seeing in the feedback that can be addressed. Additionally, we have a post contact survey that goes out to customers with three questions tied to inquiry resolution, with a specific question around the chatbot experience if they chose to go to a live agent for any reason.

### Dari Damazo

Senior Vice President of Support Services



## From the Frontlines: AI Satisfaction and the Experience Gap

If AI is becoming the face of your brand, then your customers' satisfaction with AI deserves the same rigor as any other channel. But the data from our [\*2025 CX Leaders Trends & Insights: Consumer Edition\*](#)<sup>3</sup> report in partnership with Transcom shows a disjoint. In 2025, 78% of consumers reported using self-help tools – a jump from just 55% the year prior. Adoption is up. Expectations are up. And yet, self-help solutions ranked dead last in consumer perception of experience quality, even trailing behind social media support.

The misalignment between usage and satisfaction highlights a growing "Experience Gap," a term the report uses to capture the widening divide between what consumers expect from AI-driven CX and what they actually get. Most troubling? When self-service fails, it doesn't just frustrate; it drives churn. Nearly half of consumers say they've stopped or slowed doing business



with a company due to poor customer support, with difficulty reaching a human being topping the list of frustrations.

The lesson here isn't to pull back from AI. It's to measure its impact with the same precision as human-led channels.

## This is a Strategic Conversation

Leaders know that metrics aren't just numbers; they're signals. When we measure something, we're saying it matters. Customer satisfaction for AI isn't a niche metric. It's a lens into how automation is serving your customers, supporting your people, and advancing your strategy.

This shift calls for alignment across teams. Technology, CX, and operations leaders must collaborate to define what success looks like for AI and how it will be evaluated. And that definition may evolve. A single score won't capture everything, but a thoughtful mix of CSAT, sentiment, effort, and trust metrics can provide a more complete view.

## Questions Worth Asking

As the conversation around AI satisfaction gains momentum, these questions may help spark productive dialogue within your organization:

- Are we measuring CSAT (or other satisfaction metrics) for AI interactions separately from human ones?
- How do we currently define success for our AI experiences, and does that definition include the customer's voice?
- Do our measurement tools capture resolution, emotion, and ease?
- Are we tracking satisfaction trends over time and across channels?
- How does feedback from AI experiences flow into our governance, product, and training teams?

These are not just tactical questions. They are leadership questions. And the answers will shape not only how AI is used, but how it's experienced.





“ We don’t just measure digital satisfaction—we learn from it. Each interaction, regardless of human or digital, helps us improve the service we provide regardless of the customer’s channel of choice. Each is an opportunity to deliver kindness at scale, resolve with speed, and grow from every smile or sigh. Our goal? Make digital feel as personal as each human interaction, and make every customer know we are here to help.”

#### Carolyn M. Truelove

Vice President, Customer and Operations Excellence



### The Role of the Back Office in AI Satisfaction

AI experiences don’t operate in a vacuum. Behind every virtual assistant and intelligent bot lies a maze of back-office processes, including escalations, ticketing systems, and fulfillment workflows that can either reinforce or erode customer trust. Yet, most companies still measure AI in isolation, overlooking the broader operational ecosystem that makes or breaks the customer journey.

In our *[CX Without Silos: Bridging Front- and Back-Office Operations to Elevate CX report](#)*<sup>4</sup> in partnership with NiCE, while 63% of CX leaders rated their back-office performance as “Good” or “Very Good,” nearly half still report underinvestment in this area. And only a third are satisfied with the

“ The Home Depot measures customer satisfaction CSAT on three levels in both Phone and Messaging channels as a core success metric: Likelihood to Shop Again (LTSA), Customer Effort Score (CES), and Satisfaction with the Associate as key survey dimensions.

Alongside CSAT, quality of experience is also tracked using metrics like resolution rates, containment rates (percentage of interactions fully handled by AI without escalation), and behavioral analytics (such as empathy and active listening, scored via AI for coaching and consistency).

These CSAT goals are benchmarked by establishing baselines from the previous year, defining new objectives, then tracked to drive continuous channel improvements and align with best-in-class customer service standards.”

#### Mike Jones

Senior Director – Customer Solutions/Shared Services



tech supporting it. The takeaway? You can have the flashiest AI interface on the market, but if the workflow behind it is broken or disconnected, CSAT will suffer.

Leaders serious about measuring and improving AI satisfaction must go beyond the UI layer. They should ask: Did our AI escalate appropriately? Was fulfillment triggered in a timely manner? Did the sentiment data surface to the back-office team in a way that informed resolution? These are the seams where most CX breaks down, and the places where AI satisfaction can be meaningfully improved.

## A More Complete Picture of Experience

Customer satisfaction is not the only way to measure quality, but it's a familiar, scalable starting point. Layering in other measures such as effort scores, trust indicators, and emotion analysis can help organizations evolve beyond a transactional view of satisfaction.

Ultimately, the goal isn't to hold AI to the same standards as human service; it's to hold it to the same level of care. As AI becomes more embedded in the customer journey, leaders have a unique opportunity to redefine what experience means not just for efficiency's sake, but for empathy, clarity, and loyalty.

The next chapter of CX will be shaped not just by how well AI performs, but by how well it is understood. And that starts with asking, not assuming, how customers feel.

### Article Links

1. <https://www.cxtoday.com/workforce-engagement-management/legacy-contact-center-metrics-are-on-the-way-out-heres-what-will-replace-them/>
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## What if the real power of CSAT in AI isn't the score but the story it unlocks about where to remove friction and earn loyalty faster?



We measure CSAT for our AI Agent on chat and pair it with open-text comments plus a “was your issue resolved?” signal to capture both sentiment and outcomes. Since launch just over a month ago, our AI Agent's average CSAT is good, but it's still behind human-handled chats. We read that gap as an opportunity curve, not a ceiling: humans can currently access richer data and make account-level changes, while our AI does not yet have comparable read/write access—those governance and entitlement unlocks are planned on our 2026 horizon—and our analysis suggests CSAT will converge toward human benchmarks as those capabilities grow. We also segment rigorously—by intent, hour of day, agent type, and customer segment—so we can separate “policy dissatisfaction” (e.g., refund ineligibility or after-hours agent availability limitations) from genuine experience issues. Immediate, lightweight surveys plus verbatim reviews give us a sharp, trustworthy signal to act on.

Critically, we complement CSAT with Automated Resolution (AR)—a stricter outcome metric that asks whether the customer's reason for contacting us was actually solved, safely and accurately, without a handoff. AR prevents “no-handoff” false positives and points us to opportunities to improve customer experience with our AI Agent: new data

connections, transactional capabilities, and smarter escalation timing. We report CSAT (how customers felt), AR (what was solved), and containment (what stayed automated) together, so leaders see the full experience funnel. When CSAT is low, but AR is high for a given intent, we know we're bumping into policy, not a capability gap—so we coach content, refine rules, or clarify expectations rather than retraining the bot blindly.

Our roadmap is optimistic by design: set an initial floor against human CSAT for the same intent, drive to parity as access expands, then push beyond once the AI can complete the full resolution pathway autonomously. Weekly audits of low-CSAT or unresolved threads translate directly into content updates, new ideas, and future entitlement changes. The goal isn't to chase a vanity number—it's to turn feedback into forward motion, steadily closing the AI-human gap and earning satisfaction as the natural outcome of a support experience that actually works for our guests.



### Alvin Stokes

Vice President, Global Reservation and Service Operations Guest Services







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— **Stephanie Stafford**  
Senior Director,  
Customer Experience at YETI



**Wow. It's just great leaders working with great leaders. The amount of information that is available is fantastic and quite personally I enjoy the opportunity to help others as well.**

— **Jeffrey Newman**  
Director of Strategic Accounts  
at Viasat

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## QUESTIONS?

For help with questions or to request a demo of the community, email Tyler Ainge at [tyler@execsintheknow.com](mailto:tyler@execsintheknow.com)

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**Execs In The Know**

# KIA ONLINE COMMUNITY MEMBER SPOTLIGHT



## Designing Connection: How Crate & Barrel Builds Loyalty Through Every Interaction

Kate Showalter has helped transform customer care from a reactive service into a proactive, brand-defining experience, one rooted in empathy, innovation, and the simple joy of making every home feel personal.



**Kate Showalter**

Vice President, CBH Services

**Crate&Barrel**



Nearly three decades ago, Kate Showalter began her journey with Crate & Barrel, a brand synonymous with timeless design and the art of living beautifully. What's kept her there are the people and the pursuit of connection. From the first interaction to the final delivery, Kate has helped shape a customer experience philosophy rooted in empathy, collaboration, and innovation.

Under her leadership, Crate & Barrel has turned every touch point, whether in-store, online, or in-home, into a reflection of care. For Kate, customer experience isn't a department; it's the heartbeat of the brand, where every conversation, every solved problem, and every thank-you note becomes a reminder that creating a home is deeply personal and deeply human.

### **Execs In The Know (EITK): What keeps you inspired and motivated in your role leading customer experience today?**

**Kate Showalter:** After all this time, I still love that we sell beautiful, quality products that are a part of both people's homes and my own. I love our product, but in my role, what truly inspires me after all this time is the dynamic nature of customer expectations and the endless possibilities for innovation. The retail landscape is constantly evolving, and the challenge of anticipating and exceeding customer needs keeps me energized. Seeing the tangible impact of our strategies on customer satisfaction and loyalty, and knowing that we're creating memorable moments in their homes, is incredibly rewarding. It's about continuous learning, adapting, and striving for excellence in every interaction.

### **EITK: Customer experience often comes down to people. How do you approach empowering and motivating your teams to deliver exceptional experiences?**

**Kate:** We foster a culture of ownership, empathy, and continuous improvement. This means providing comprehensive training that goes beyond product knowledge to encompass

emotional intelligence and problem-solving skills. We celebrate successes, learn from challenges, and ensure every team member understands their vital role in the larger CX ecosystem. Ultimately, when our teams feel valued, supported, and equipped, they naturally deliver exceptional experiences.

### **EITK: Crate & Barrel has a strong omnichannel presence, from in-store to online to delivery. What have been some of the biggest challenges and opportunities in creating a seamless customer journey across these touch points?**

**Kate:** Creating a truly seamless omnichannel journey is both a significant challenge and a massive opportunity. The biggest challenge lies in integrating disparate systems and processes to ensure a consistent brand experience, regardless of how the customer interacts with us. However, the opportunity is immense.

We work hard to meet customers wherever they are, offering convenience, personalization, and choice across their personal journey. It enables us to leverage the strengths of each channel – the tactile experience of in-store, the breadth of online, and the convenience of home delivery – to create a holistic and delightful experience that builds lasting loyalty.





**EITK: In your experience, what role does collaboration play in process improvement, and how do you balance process with the "human" side of CX?**

**Kate:** At Crate, we are customer-focused from the top down. Collaboration is the bedrock of effective process improvement in CX. No single department owns the customer journey; it's a collective effort. By bringing together teams from merchandising, supply chain, technology, and marketing, we gain diverse perspectives, identify pain points, and co-create solutions that truly address customer needs.

While our goal is to reduce friction for the customer, we still strive to ensure that we are there when they need us. Balancing process with the "human" side of CX means designing efficient systems that enable, rather than hinder, genuine human connection. Processes should streamline repetitive tasks, freeing up our teams to focus on empathetic interactions and personalized service. It's about using technology to enhance, not replace, the human touch, ensuring our processes support the emotional and relational aspects of the customer experience.

**EITK: Retail continues to evolve quickly, especially with shifts in consumer behavior. How has your perspective on CX changed most since you first started at Crate & Barrel?**

**Kate:** My perspective on CX has evolved dramatically. When I started, the focus was largely transactional and reactive across retail. Today, it's profoundly relational and experiential. The biggest shift has been the recognition that CX is not just a department, but the entire business. Customers expect more than just a product; they seek meaningful interactions, personalized recommendations, and a brand that aligns with their values.

The rise of digital has amplified the need for convenience and instant gratification, but also the importance of authentic human connection. My focus has shifted from simply meeting expectations to consistently exceeding them and proactively anticipating future needs, from reactive to proactive service that makes a difference to the customer.

**EITK: AI and digital innovation are transforming retail. What excites you most about these changes, and where do you see the greatest opportunities for enhancing the customer experience?**

**Kate:** AI is a big deal, and digital innovation is incredibly exciting for CX. I believe that we need to use AI as a tool across our CX, not just as a deflection lever. What excites me most is the potential for hyper-personalization at scale. AI can analyze vast amounts of data to predict customer needs, offer tailored recommendations, and even



anticipate potential issues before they arise. We will use AI across our organization, with some of the best opportunities being:

- **Proactive Service:** Using AI to identify and resolve customer issues before they even become complaints.
- **Personalized Journeys:** Creating truly individualized shopping experiences, from website navigation to in-store interactions.
- **Enhanced Self-Service:** AI-powered chatbots and virtual assistants that provide instant, accurate support, freeing up human agents for more complex issues and always keeping a human in the loop
- **Operational Efficiency:** Optimizing inventory, logistics, and delivery to ensure a smoother and more reliable customer journey.

Ultimately, these innovations allow us to deliver a more intuitive, efficient, and delightful experience for every customer.

### **EITK: As a CX leader, what metrics or signals do you pay the closest attention to when gauging the health of your customer experience?**

**Kate:** While many metrics are important, I pay the closest attention to a few key indicators that provide a holistic view of the quality of our customer experience, including net promoter score (NPS), customer satisfaction (CSAT), CSAT for AI, and time to resolution (TTR) are some of the most important to me. I may use productivity metrics to ensure that we are being effective and efficient, or to plan work more strategically, but first and foremost, we care about quality indicators.

### **EITK: Can you share a moment, either from a customer story or within your team, that reminded you why this work matters?**

**Kate:** I love what we do. I don't think of my CX role in the traditional view of Customer Service as the clean-up crew at the end of the line. Our role is to enable brand growth. We build loyalty and relationships with customers that differentiate our



brand from our market. And we help the rest of our organization identify opportunities to consistently improve our customer experience.

But my favorite moments are when we can really feel the difference that we've made to the customer. For example, finishing the baby nursery just in time for her arrival, making sure the delivery to a brand new home goes off perfectly, and even getting the grill there in time for the big game. It's all important. I keep every personal thank-you note I've ever received from a customer. That's how I know it matters.

### **EITK: When you're not focused on customer experience, what brings you joy and balance outside of work?**

**Kate:** I find so much joy in my family, especially watching my daughters grow up to be strong women themselves. Although they often joke with me that I need a hobby, so maybe I'm really not that great at balance. And true to my brand, I love my home and entertaining family and friends. Cheers!



### About Kate Showalter

Kate Showalter is the head of Customer Care and Customer Insight for all Crate & Barrel Holdings, Inc. (CBH) brands, including Crate & Barrel, CB2, Crate & Kids, and Hudson Grace. Kate brings 35 years of retail experience—30 with Crate & Barrel—spanning stores, global franchise development, customer service, and project management. The organization is revered for its customer focus and service, and Kate's teams engage with over 5 million customers each year, providing seamless support across voice, email, chat, and SMS platforms.

As former head of the CBH Program Management Office (PMO), Kate implements a wide variety of customer experience initiatives for the brands through her oversight, governance, and execution of all large-scale projects for the enterprise organization. Prior to starting in her role as leader of the PMO in 2016, Kate launched the International Operations Team responsible for the operational direction and opening of over 20 international stores in 3 years. With a background in Retail Store Leadership, Kate has a passion for creating consistently positive customer experiences. She believes that brands are measured with each interaction and strives to build and foster positive lifetime customer relationships.

Kate holds a BA in English Literature from the University of Maryland. In her spare time, she enjoys curling up with a good book or sharing game nights with her teenage daughters.



### Execs In The Know

Thank you to Kate for her leadership, participation, and insights. To connect with Kate 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.

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# Break The Stigma



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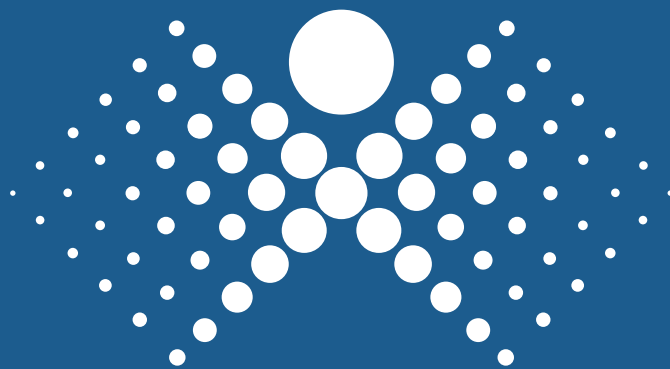
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