



# Beyond Recovery: Shaping a CX Model That Anticipates, Prevents, and Delights



**Execs In The Know**



# Anticipatory Customer Service

*Anticipating a customer's needs  
... before they even realize they have a need.*

# Welcome The Panelists



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# Where Do Companies Get Stuck

...when trying to move from reactive to proactive?



Let's Talk Use Cases!





# Example Proactive Use Cases

Credit Card on File  
About to Expire

Payment Failure  
Risk Alert

Usage Approaching  
Plan Limit

Subscription  
Underutilization Flag

Renewal Reminder  
with Value Recap

Shipping Delay  
Notification Before  
Customer Asks

Proactive Refill  
Reminder

Product Issue /  
Recall Outreach

Low Balance  
Warning with Auto-  
Transfer Option

Service Outage  
Detection Before  
Complaint

Feature Adoption  
Nudge

Warranty Expiration  
Reminder with  
Upgrade Offer

Weather Impact  
Travel Alert

Maintenance Due  
Reminder

Onboarding Stall  
Detection



# Data, AI, Prediction Models

How does your company use them  
when being proactive?





# How Do You Measure Success?



# How to Measure Results of Proactive Outreach?



## **PILOT:**

- We identify “at-risk” customers using data points such as inbound service calls and free service requests, then incorporate them into our proactive outreach program.
- Completed 128,065 proactive calls year-to-date.

## **RESULTS:**

- The analysis showed that speaking directly with customers through proactive outreach increased retention by up to 647 basis points.
- Based on these results, we’ve invested additional labor dollars in 2026 to expand this initiative





# What's Realistic in the Next 12–24 Months?





Questions?