

LEADER CHOICE ROUNDTABLE
CUSTOMER RESPONSE SUMMIT
SCOTTSDALE, AZ

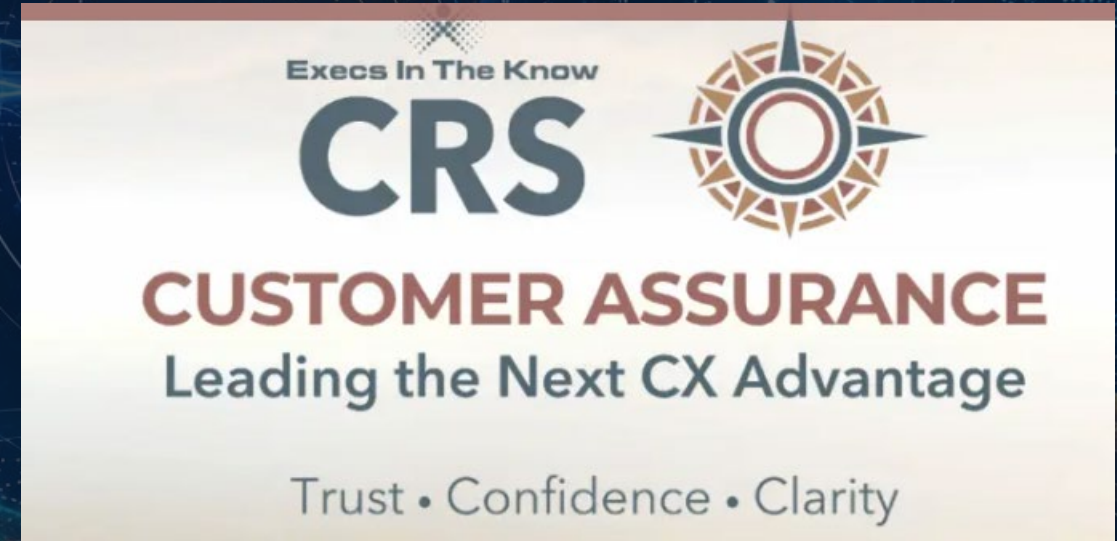
Balancing AI-Driven Automation with Human Connection

AND PROVING THE ROI

A peer-driven conversation for CX leaders

EXECS IN THE KNOW • FALL 2026

FACILITATED BY BRIAN ZEMPEL, ALEX NAZHA, SPENCER WILSON | GATESTONE



OPENING POLL



Who in this room is confident they are winning the race to balance AI and CX strategies while delighting customers?

BE HONEST Is today's CX environment the most challenging ever?

Today’s roundtable: three decisions that matter & how to win the race

Our facilitation arc designed to maximize peer exchange and practical takeaways.

00–05

OPEN

Surface the room’s biggest AI challenge.

START MAKING CONNECTIONS!

05–20

DISCOVER

Where does AI create value or risk?

20–35

STRATEGIZE

What becomes uniquely human?

35–50

RECONSIDER

How do we measure real value?

50–60 | COMMIT + CLOSE

Name one decision or metric you will reconsider, then commit to one journey where AI should do more and one where it should do less.

LET'S GET CRS OFF TO A GREAT START!

Your facilitators for today's Leader Choice Roundtable



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Gatestone

BZ



Brian Zempel

FACILITATOR

AN



Alex Nazha

FACILITATOR

What is your biggest AI challenge today?

Introduce yourself, choose one, and add a sentence of context.

1

DEPLOYMENT

Where to start

2

ADOPTION

Getting used

3

GOVERNANCE

Managing risk

4

CUSTOMER EXPERIENCE

Avoiding friction

5

AGENT IMPACT

Redesigning work

6

DATA CONFIDENCE

Trusting inputs

7

ROI MEASUREMENT

Proving value

TABLE DISCUSSIONS AND WHITEBOARD OPPORTUNITY

Where has AI exceeded expectations, and where has it disappointed?

Start with real customer journeys, not technology capabilities.

- 1 What should never be fully automated?
- 2 Where has customer frustration increased?
- 3 What signals indicate a human is needed?
- 4 How do you choose self-service vs. live assistance?
- 5 What did you change after initial deployment?

WHEN THE JOURNEY GOES RIGHT



Customer self-serves

Answer found in under a minute



Friction is detected early

Sentiment triggers a hand-raise



Warm handoff to a human

Agent arrives with full context



Resolved on first contact

No repeating, no re-routing

THE OUTCOME

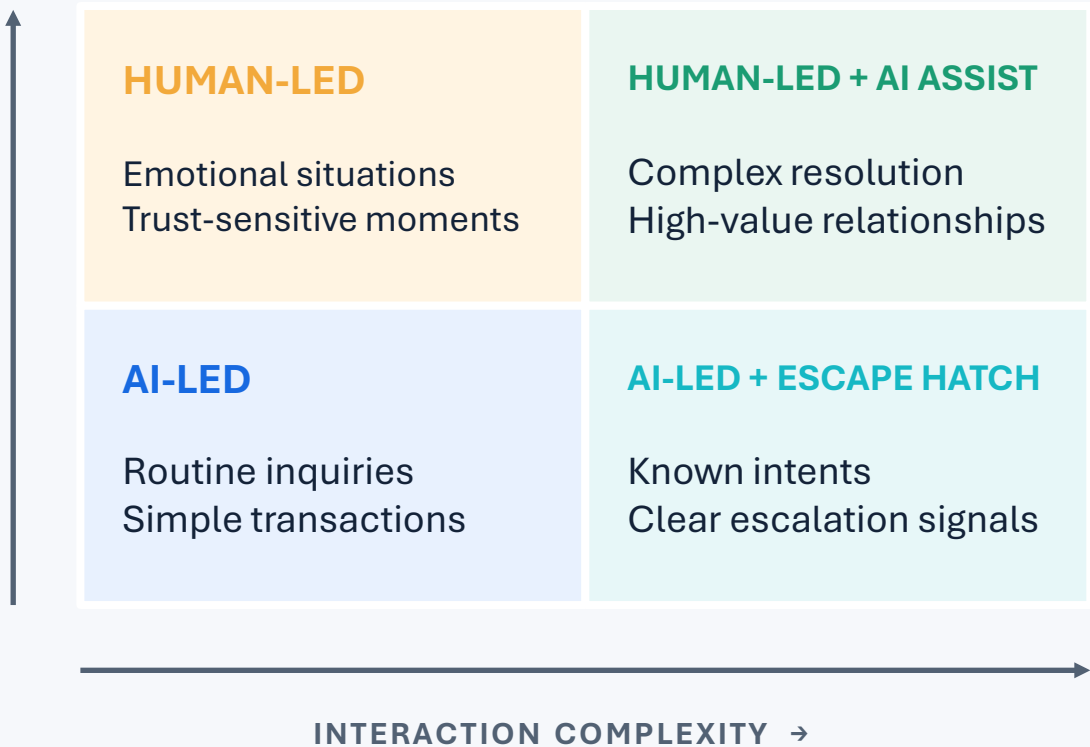
One touch, higher CSAT, lower cost to serve

KEY REFRAME The goal is not maximum automation. It is the right intervention at the right moment.

Design the handoff, not just the channel

Use interaction complexity and customer stakes to decide the appropriate operating model.

CUSTOMER STAKES →



Roundtable challenge

- ☐ Choose one live journey.
- ☐ Name the customer signal.
- ☐ Define the handoff moment.
- ☐ Identify the metric that proves it works.

**REVENUE OPPORTUNITIES =
HYBRID BY DESIGN**

If AI handles routine work, what is the agent’s role three years from now?

LEADER CHALLENGE: Shift the conversation from task removal to value creation



PROMPTS FOR THE ROOM

How are hiring profiles changing? Which skills matter more? What happens to supervisors and QA? How does AI affect engagement and retention?

The strategic question: What should humans become better at because AI exists?

Finish the sentence...

Round-Robin with each table team, and Quick Read-Out

“The most valuable human capability in CX service delivery will be _____.”

EMPATHY

CRITICAL THINKING

JUDGMENT

NEGOTIATION

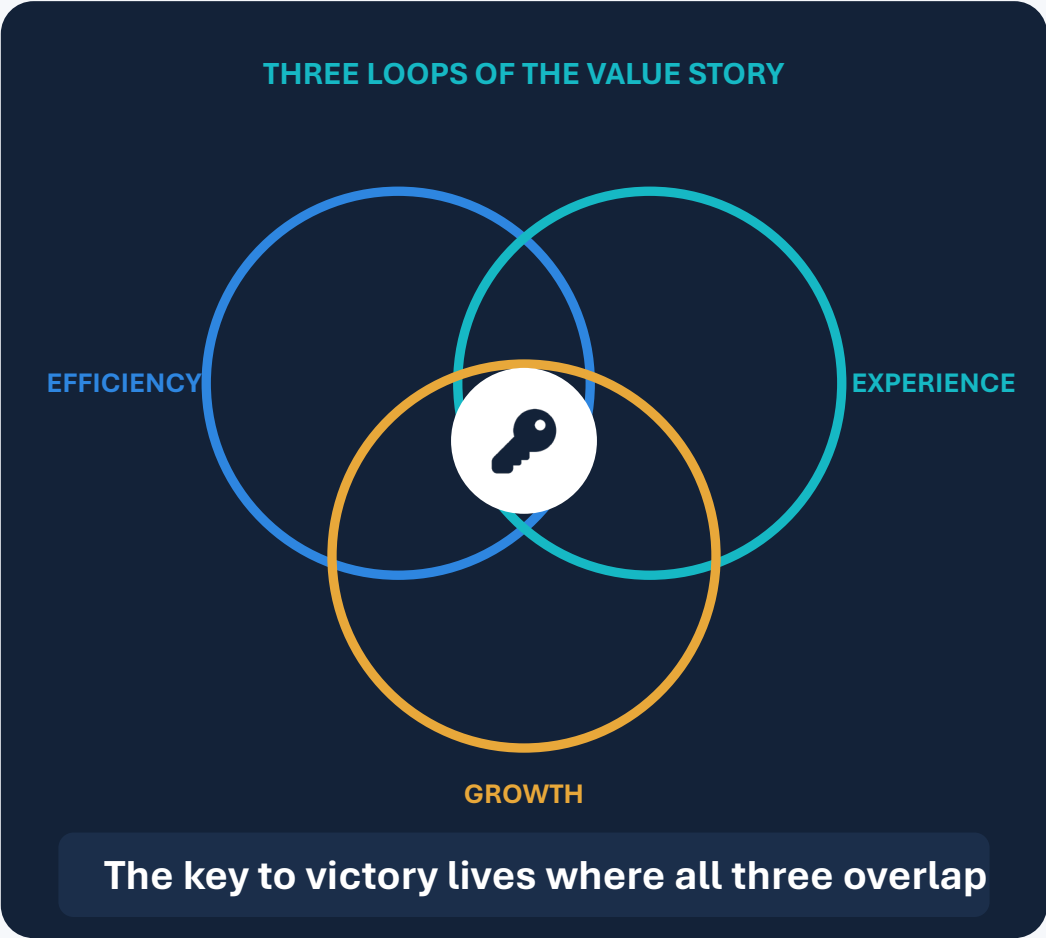
RELATIONSHIP BUILDING

REVENUE GENERATION

TRUST

What metrics tell the full AI & Digital CX value story?

Keys to Victory: Move from activity and avoidance metrics to customer and enterprise outcomes.



THE USUAL SCORECARD

Cost reduction	Productivity
Containment	Headcount efficiency

THE MISSING SIGNALS

Repeat contacts	Customer effort
Escalation quality	Knowledge improvement

THE VALUE OUTCOMES

Retention	Customer lifetime value
Revenue impact	Cross-sell / up-sell

Challenger: Are our easiest metrics hiding our biggest problems?

Measure AI across three dimensions

No single KPI can prove that automation is improving the business.

OPERATIONAL

Can we execute better?

- Cost per contact
- Productivity
- Speed / handle time
- Containment

EXPERIENCE

Does it feel better?

- CSAT / NPS
- Customer effort
- FCR / repeat contact
- Escalation quality

BUSINESS OUTCOMES

Does value increase?

- Retention
- Revenue
- Customer lifetime value
- Cross-sell / up-sell

ONE OPERATING RULE Pair every efficiency metric with one customer metric and one business outcome.

Is containment helping, or hiding problems?

Group Exercise: Section 3- Choose Sides!

SIDE A

“Containment is the clearest AI success metric.”

- Simple
- Comparable
- Directly tied to cost

SIDE B

“Containment often masks customer experience issues.”

- Can hide repeat contacts
- May suppress needed escalation
- Does not prove resolution

VS

**SYNTHESIS: containment is a signal, not a verdict.
Validate it with resolution, effort and downstream outcomes.**

What will you reconsider after today?

Keep each response to 30 seconds- Consider your best options for success!

1

ONE DECISION

**Where should AI
do more?**

2

ONE BOUNDARY

**Where should AI
do less?**

3

ONE METRIC

**What will you add
or rethink?**

30 seconds each • make it specific • no explanation required

THE 60-DAY CHALLENGE

Do more. Do less. Measure what matters.

Identify one customer journey where AI should do more and one where AI should do less.

AI success is not about maximizing automation.

It is about maximizing CX outcomes.

01

OPERATIONAL

Choose one efficiency metric.

02

CUSTOMER

Choose one experience metric.

03

BUSINESS

Choose one outcome metric.

**One year from now, what
will separate AI leaders
from AI followers?**