

JANUARY 2024 | QUARTER 1



# CX Insight

AN EXECS IN THE KNOW PUBLICATION

## Driving **Bold** Change

Unlocking growth with AI, total experience, and hyper-personalization.

**HOW CX LEADERS ARE  
ACHIEVING PERSONAL  
AND ORGANIZATIONAL  
VALUE WITH AI**

TRANSFORMING YOUR  
CX WITH PREDICTIVE  
PERSONALIZATION USING AI:  
HYPER-PERSONALIZING THE  
CUSTOMER EXPERIENCE

MOVING BEYOND CUSTOMER  
EXPERIENCE AND EMPLOYEE  
EXPERIENCE TO TOTAL  
EXPERIENCE



**BRAND SPOTLIGHT:  
MICROSOFT**



# CX Insight

AN EXECS IN THE KNOW PUBLICATION

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# Welcome

## to the January 2024 edition of *CX Insight* magazine, an Execs In The Know publication.

Looking ahead as we chart the course for CX excellence.

Happy New Year! As we step into the first quarter of 2024, we are thrilled to present the latest edition of *CX Insight* magazine. In this issue, we delve into cutting-edge trends, innovative strategies, and the inspiring stories of industry leaders shaping CX's future.

Our feature articles provide an in-depth look at the intersection of artificial intelligence (AI) and CX to showcase firsthand accounts and expert insights highlighting how AI is becoming integral to the CX landscape. We also investigate the latest technologies and strategies enabling businesses to create hyper-personalized interactions and learn how leading organizations adopt a holistic approach to create a seamless and integrated total experience (TX).

Our Brand Spotlight features an exclusive interview with Carlos Castano from Microsoft, who shares insights into the brand's

customer-centric ethos, inclusive culture, and commitment to delivering exceptional experiences. Additionally, we interview Traci Lamm from Forbes for the KIA Online Community Member Spotlight feature.

As we explore the synergy between AI, hyper-personalization, and total experience, we invite you to embark on a journey of discovery with *CX Insight* magazine.

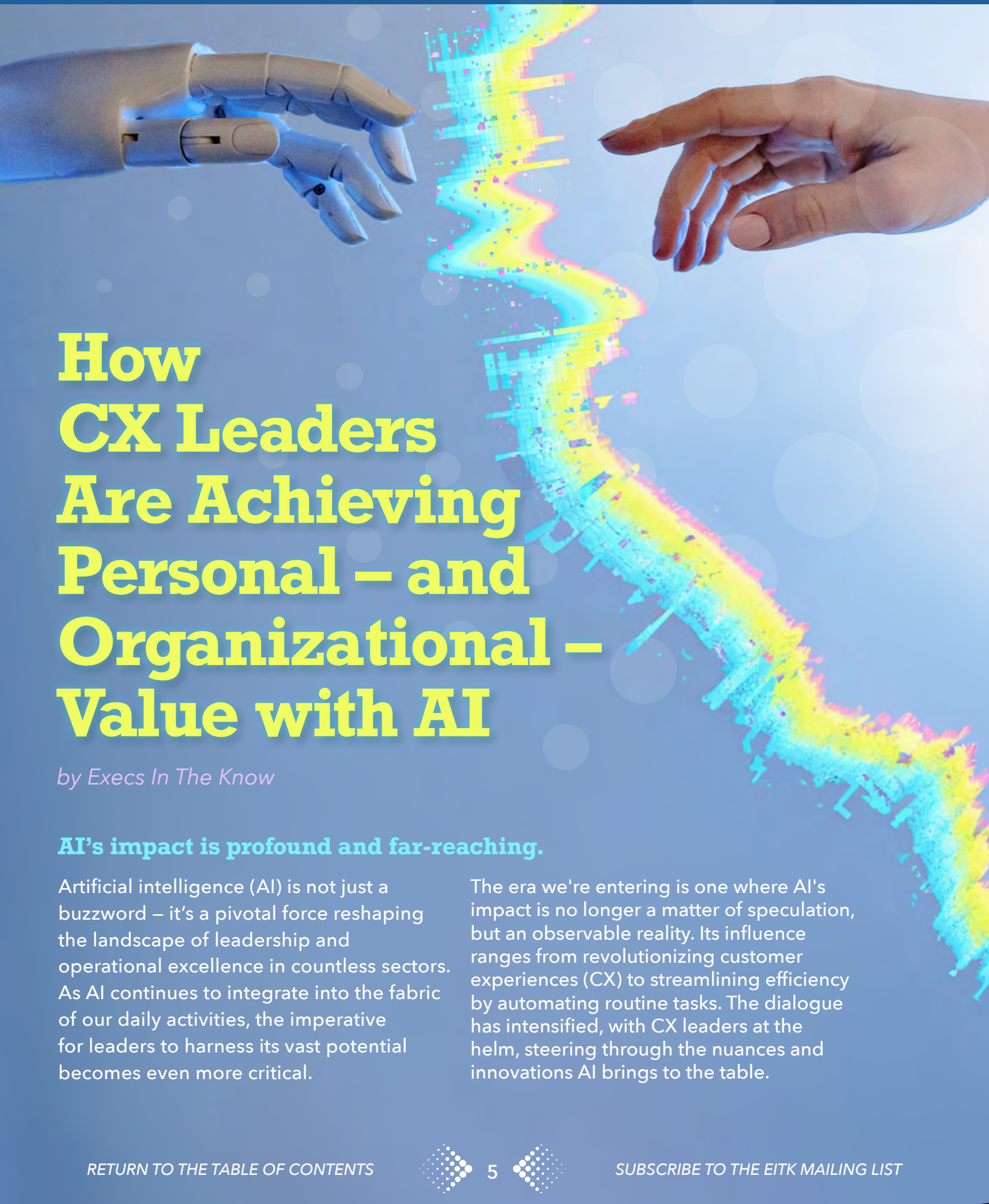
Thank you for being a part of our community. As always, we hope that something in this issue enlightens your perspective and provides the spark for new ideas and innovation. ✨

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# How CX Leaders Are Achieving Personal – and Organizational – Value with AI

*by Execs In The Know*

## **AI's impact is profound and far-reaching.**

Artificial intelligence (AI) is not just a buzzword – it's a pivotal force reshaping the landscape of leadership and operational excellence in countless sectors. As AI continues to integrate into the fabric of our daily activities, the imperative for leaders to harness its vast potential becomes even more critical.

The era we're entering is one where AI's impact is no longer a matter of speculation, but an observable reality. Its influence ranges from revolutionizing customer experiences (CX) to streamlining efficiency by automating routine tasks. The dialogue has intensified, with CX leaders at the helm, steering through the nuances and innovations AI brings to the table.

The recent global challenges, especially those underscored by the pandemic, have compelled organizations to rethink and reinvent their leadership strategies and operational models. Leaders are now tasked with guiding their teams through uncharted territories, where AI's role is significant and evolving.

This transformation is not just about automation, but redefining the workforce. AI's reach extends to the core of customer experience, where it's changing the game and setting new rules on engagement and satisfaction.

According to [The 2023 State of Social Media report](#)<sup>1</sup>, 94% of business leaders feel very confident about integrating AI into their workflows. Yet despite such assuredness, 98% of leaders acknowledge they need to better understand AI's long-term potential.

The question that emerges for us, as CX leaders, is multifaceted: How do we adapt to this AI-infused landscape? How can we leverage AI not just for operational efficiency but as a tool for enhancing our leadership impact, influence, and personal lives? As we stand at this intersection of AI advancement and leadership evolution, it is crucial to explore and embrace the transformative power of AI in redefining our roles and the experiences we deliver.

So, how can we, as CX leaders, navigate this complex and ever-evolving AI-powered world?

## Understanding How CX Leaders Are Using AI

Individual value from AI is critical for organizations to obtain value from AI. While CX leaders are successfully utilizing AI for operational tasks, driving growth, setting the right priorities, and investing more time in humans, we are also seeing how they value AI's ability to help them augment their own skills and roles.

This suggests that leaders recognize that the way in which they approach their jobs is changing and that they welcome support in

refining their leadership skills. Execs In The Know recently spoke with CX leaders within the community to discuss how they are achieving personal and organizational value with AI.

### Execs In The Know (EITK): How do you leverage AI-powered tools for your personal and professional development? Can you share specific instances where AI recommendations or personalized learning paths have made a positive impact?

**Ebrahim Hyder, Vice President, Customer Service at Michael Kors:** Emerging technologies, particularly artificial intelligence (AI), play a crucial role in enhancing my personal and professional growth. In my Customer Experience (CX) role, AI streamlines the editorial process of our global newsletter by unifying various writing styles into a consistent brand voice, improving grammar and structure. This allows me to concentrate on design aspects, enhancing the newsletter's appeal.

Similarly, AI assists in my DJ hobby, creating engaging social media content and visually appealing album covers, which increases my online presence. Most impressively, AI contributed to my son's successful class president campaign by generating slogans, branding, and messaging content for his running platform. AI has proven to be an invaluable partner, enriching both my career and personal endeavors with its digital prowess.

### EITK: Can you share how AI has helped you become more productive, efficient, creative, or innovative?

**Paul Brandt, Chief Experience Officer at GoodLeap:** Just seeing the power of AI and what it can do has been eye-opening. I started as somewhat skeptical, thinking AI was just the latest in a long string of buzzwords or the "latest hot thing." But now that I've had a chance to dive in, educate myself, and get some hands-on experience, I see that is not the case. There's a reason for the buzz around AI, and it's because it's real. AI is not something that is coming soon, it's here now.





Part of what has taken me from being a skeptic to a true believer is hands-on experience. I've played with some very challenging and complex use cases that I initially didn't think AI could handle. AI could handle those use cases and did it with speed, accuracy, and an almost mind-boggling completeness. So, once you understand the power of AI, I believe it opens your eyes to a new realm of what is possible.

**EITK: How do you envision AI shaping the future of CX leadership?**

**Ebrahim:** In my opinion, AI will take CX leadership to a whole new level once prudent guardrails are established. Instead of drowning in a sea of data, leaders will have AI-powered analytics, giving them real-time insights into their customers, agents, and all those fancy acronyms like key performance indicators (KPIs) and service level agreements (SLAs).

Leaders will not be overwhelmed by data; instead, AI-powered analytics will provide a keen understanding of customers, agent performance, and KPIs in real time. Leaders can shift focus from reactive firefighting to proactive strategy and pre-emptive resolution. For leaders swamped with incoming emails, generative writing tools will craft personalized responses conveying true empathy, compassion, and creativity at scale.

However, for AI's potential to be fully realized, leaders must nurture the human touch that no algorithm can ever replace. Vigilant discernment and governance must ensure AI recommendations align with corporate values. Leaders and agents should be empowered to override AI-generated outputs that fail to capture nuance to ensure quality emotional connection.



Remember, [AI] can't replace the beautiful messiness of human interactions. We're the ones with all the emotional intelligence, creativity, and understanding of nuance. So, consider AI as an asset, not a replacement. Use your discernment skills to make sure it's doing its job right."

**Paul:** I can't foresee a future where CX leaders are not leveraging AI in some shape or form. AI will be a "must-have," and CX leaders will have the opportunity to lead from the front with AI for their organizations.

**EITK: What's your experience with AI-based coaching or mentorship platforms for your professional growth as a CX leader? Have these platforms provided you with valuable insights or recommendations that significantly impacted your leadership approach?**

**Ebrahim:** My company hasn't officially hopped on the AI coaching train, but I've taken it upon myself to explore several AI tools. Consider me a curious student researcher, actively experimenting with leading platforms through extensive hands-on testing. Each new tool has a unique personality and skill set. For example, I actively play with and use AI tools like Anthropic, CoPilot, Murf, Perplexity, Rtyr, and Clipchamp. I've seen first-hand how prompt crafting directly impacts an application's effectiveness and personality.

This self-directed immersion has established me as our department's AI expert. I now educate teams through interactive presentations and demos so we collectively harness AI's power at scale.

**EITK: What advice would you give fellow leaders aiming to harness AI technologies for their personal use and learning and development journeys?**

**Paul:** Why wait? There are endless courses, classes, blogs, vlogs, articles, free trials, playgrounds, etc., that you can start to learn from, so there's really no reason not to dive right in. The longer you wait to get up to speed on the power and benefits of AI, the more likely you are to miss the boat. One thing I know for sure... your competition isn't waiting!

**Ebrahim:** My advice to fellow leaders would be to view AI as a tool to enhance human capabilities, not replace them. When it comes to AI, think of it like a trusty sidekick that helps you level up. It can automate tasks, give real-time insights, and help you make better decisions.

But remember, it can't replace the beautiful messiness of human interactions. We're the ones with all the emotional intelligence, creativity, and understanding of nuance. So, consider AI as an asset, not a replacement. Use your discernment skills to make sure it's doing its job right. Scrutinize the results, look for flaws and biases, and be aware that AI still needs human supervision and interpretation. We're in charge, and AI is here to help us create those personalized customer experiences.

And finally, get in there and play around with it. There's an AI application for every possible task, scenario, or project that needs an inspirational or creative kick-start.

**EITK: Can you share specific instances where AI-driven insights have led to significant organizational improvements or innovations?**

**Paul:** Our agents handle such a wide variety of incoming customer requests that there was no easy way to ensure all the information they needed was readily accessible. We built a very comprehensive training environment, knowledge management system, and closed-loop feedback mechanism, but it's still a challenge, simply due to the vast amount of knowledge needed when dealing with consumer financing loan applications.





So, seeing how AI can help assist our agents by acting as their "co-pilot" during real-time interactions is very powerful. Our agents are phenomenal ... they're the best in the world in what they do, and our NPS score underpins that. But, with an AI "co-pilot," they'll be able to take that to an entirely new level. This will not only benefit the customer, but make it easier for them (our agents), thereby increasing the employee experience, too.

**EITK: How do you see AI shaping your organization's future of customer support and engagement?**

**Paul:** I see AI playing a major role. It truly is game-changing! The ability to further service customers and the use cases you can apply to AI are innumerable. There are just so many benefits, with very little to no downside. AI can help improve the overall customer experience, supplement your existing employees by acting as a co-pilot for them (and thus enhance the employee experience), lower cost, and make your organization operate in a 24/7 manner when otherwise that might've been too costly to explore. It can also help your organization with complex problems that might be blind spots in your organization today, etc. I could go on seemingly forever with how we can leverage AI for customer support.

**EITK: What challenges or ethical considerations have you encountered while implementing AI-driven strategies?**

**Paul:** With AI being so new, two main challenges to overcome are adoption and ensuring everyone feels comfortable with the level of oversight to protect privacy. On the adoption front, various forms of AI customer tools are rolling out. So, adoption will grow organically over time. Eventually, it will be a “must” for businesses to have some form of AI to stay competitive. As for privacy, it shouldn’t matter if – as a customer – you’re interacting with a person or AI. You have the same expectations that your information is being used and protected appropriately. Therefore, as business leaders who are building and launching these AI tools, we must ensure they’re handling personal and private information in the same strict, authorized manner as we expect from our employees. This includes proper oversight, curation, verification, etc.



## Achieving Organizational Value with AI

Let's look at a few other ways CX leaders can drive organizational value using AI.

### Stay Curious

It's crucial for leaders to remain inquisitive and adaptable. While AI may seem daunting, especially for those without a technical background, it shouldn't deter you from embracing its potential. There's no need to become an AI expert immediately, but understanding its basics, workings, and possible applications in your personal and professional life is beneficial.

Moreover, it's easy to be swept away by AI's excitement, feeling compelled to integrate it into every facet of your business. However, AI should be viewed as one of many tools in your leadership arsenal. Stay focused on the broader objectives, strategizing where and how AI can enhance your career journey and business. Implement AI only when it aligns with your company's goals and values, ensuring effective communication with all stakeholders: employees, investors, and customers.

### Start Small and Adapt

You don't need to commit fully from the start. Begin with a manageable project or specific issue. For instance, consider using AI to streamline repetitive tasks such as data entry or customer queries. After achieving initial success, use this foundation to address more complex challenges.

Remember, AI is an evolving technology; continuous iteration and improvement are key. Embrace the learning process, including potential mistakes or unsuccessful attempts. Embody Google's philosophy as articulated by Eric Schmidt: "We celebrate our failures. This is a company where it is absolutely okay to try something that is very hard, have it not be successful, take the learning and apply it to something new."

## Fostering Employee Engagement

In the evolving landscape of work, where diverse working modes and digital connectivity tools are prevalent, the importance of human connection remains paramount. AI systems emerge as a vital tool in this context, offering deep insights into employee profiles, including their strengths, weaknesses, passions, and anticipated needs. These insights, derived from behavioral science applications like versioning and simulated dialogues, empower leaders to forge stronger individual connections with their team members. This fosters a workplace where each employee is recognized and motivated.



**Eventually, it will be a must for businesses to have some form of AI to stay competitive"**

For instance, generative AI plays a crucial role in employee self-development, sparking creativity and innovation, and opening new avenues in learning and career growth. Personalized growth plans can be crafted, encompassing specific skill development, recommended courses, and networking opportunities.

Moreover, when combined with traditional AI, this technology can align leaders and employees with suitable roles and projects, enhancing job satisfaction and team motivation through meaningful work engagements.

## Transforming Team Communication

As digital connectivity reshapes team communication, making it simultaneously more flexible and complex, AI offers unique solutions. Utilizing sentiment analysis and natural language processing, originally developed for consumer insights, generative AI can now personalize communication strategies for team leaders. This approach ensures effective reach to each team member, whether in person or via digital collaboration tools.

AI's potential in creating a more inclusive workplace is noteworthy. While it cannot replace human empathy and reasoning, AI can streamline

conversation facilitation and manage diverse communication platforms efficiently. Leaders can use AI to moderate discussions, ensuring every voice is heard, thus fostering balanced dialogue, empathy, and mutual understanding.

## Enhancing Organizational Decision-Making

Generative AI significantly impacts strategic business decisions by analyzing large data sets to uncover common themes. This assists leaders in making informed, data-driven decisions. AI's insights into customer behavior, market trends, and competitive analysis enable leaders to adopt a proactive and strategic approach.

In retail, for instance, AI analyzes inventory, supply chains, and customer feedback, providing actionable recommendations and responses. This level of insight equips leaders to make timely decisions and optimize product placement or marketing strategies. While embracing AI's transformative role in leadership, it's crucial to consider ethical and privacy concerns. Transparency and commitment to ethical AI usage are essential in this new leadership paradigm. Leaders should cultivate an open, knowledge-sharing culture, emphasizing ethics and privacy in AI training programs and discussions.

Generative AI offers leaders an unparalleled opportunity to enhance their effectiveness and adaptability. By responsibly harnessing its potential, leaders can steer their teams toward unprecedented growth and innovation in an ever-changing, AI-driven landscape.

## A Far-Reaching Impact

AI is revolutionizing the role of CX leaders, providing them with tools and insights to drive personal and organizational growth. From personalizing customer experiences to fostering innovation, AI's impact is profound and far-reaching. As technology continues to evolve, the potential for CX leaders to leverage AI in creating value is boundless.

Those who embrace this opportunity will not only lead their organizations to new heights, but redefine customer experience standards in the digital age.

## Links

- <https://sproutsocial.com/insights/data/harris-insights-report-2023/>



subscriber id 7651939

# Transforming Your CX with Predictive Personalization Using AI: Hyper-Personalizing the Customer Experience

by Execs In The Know

**The future of customer experience lies in the ability of businesses to deliver predictive personalization that respects privacy.**

In the information age, the power to tailor and enhance the customer experience (CX) lies squarely in data collection and analysis. With the advent of artificial intelligence (AI), the era of predictive personalization has taken center stage, offering businesses unprecedented capabilities to meet and anticipate customer needs.

This forward-thinking approach relies heavily on meticulously gathering and interpreting customer data, behavior patterns, and historical interactions. By doing so, businesses can cultivate a deep understanding of individual preferences and deliver CX that is not just personalized, but predictive.

## The Power of Predictive Analytics

Predictive analytics is the difference between reactive business strategies and proactive customer engagement. Examples: When a streaming service recommends shows you're likely to enjoy, or when a financial service provider alerts you about an investment opportunity. Predictive personalization is a game-changing approach in the modern business landscape, which AI increasingly drives.

At its core, hyper-personalization is the process of tailoring experiences, products, and services to individual customers based on predictive analytics. This advanced form of personalization leverages AI to sift through massive amounts of data, understand behavior patterns, and anticipate customer needs with remarkable accuracy.

With the intelligent collection and analysis of customer data, businesses can effectively harness this data to unlock profound insights into individual preferences. This is not about inundating customers with random marketing messages, but about crafting experiences that are meaningful, relevant, and timely to each customer.

McKinsey & Company<sup>1</sup> wrote that the CX programs of the future will be holistic, predictive, precise, and clearly tied to business outcomes. Evidence suggests that the advantages will be substantial for companies that start building the capabilities, talent, and organizational structure needed for this transition. Those that stick with the traditional systems will be forced to play catchup in the years to come.

## Barriers to Predictive CX

Despite the advantages, there are significant barriers to implementing effective predictive CX. One of the main challenges is data quality. Poor data quality can lead to inaccurate predictions which, in turn, can damage customer relationships rather than strengthen them. Data silos, where information is isolated within different departments or systems, can also make it difficult to have a unified view of the customer.

To overcome these barriers, organizations must invest in robust data management systems and foster a culture of collaboration across departments. This can involve training for staff on the importance of data quality and the use of integrated technology platforms that can break down data silos.

## Real-Time Actionability

With AI, it's possible to analyze customer data in real-time and instantly adjust marketing strategies or customer service responses. For instance, if a predictive model identifies a customer who is likely to churn, a company can immediately reach out with a personalized retention offer.

Strategies for real-time actionability include setting up automated triggers based on predictive models and integrating AI tools with customer relationship management (CRM) systems to enable immediate and personalized responses to customer behaviors.

## The Interplay of Personalization and Privacy

The interplay between personalization and privacy in the context of AI-driven customer experience is a delicate balancing act. Consumers increasingly crave personalized interactions that show a deep understanding of their preferences and needs, yet they are simultaneously more aware and concerned about their privacy than ever before.

According to [Zendesk's CX Trends report<sup>2</sup>](#), 62% of consumers want more personalized experiences, while only 21% strongly agree that businesses are doing enough to protect their data.

This dichotomy presents a challenge for businesses employing predictive analytics to hyper-personalize the customer experience.

## The Demand for Personalized Experiences

Consumers today not only appreciate, but expect, a level of personalization that goes beyond generic marketing messages and product recommendations. They want services that adapt to their changing needs and preferences in real-time. For example, when a user logs into a music streaming service, they anticipate that the platform will recommend tracks aligning with their recent listening habits. This level of personalization requires the collection and analysis of vast amounts of personal data, including past behavior, search history, and even location data.



## Privacy Concerns in Data Utilization

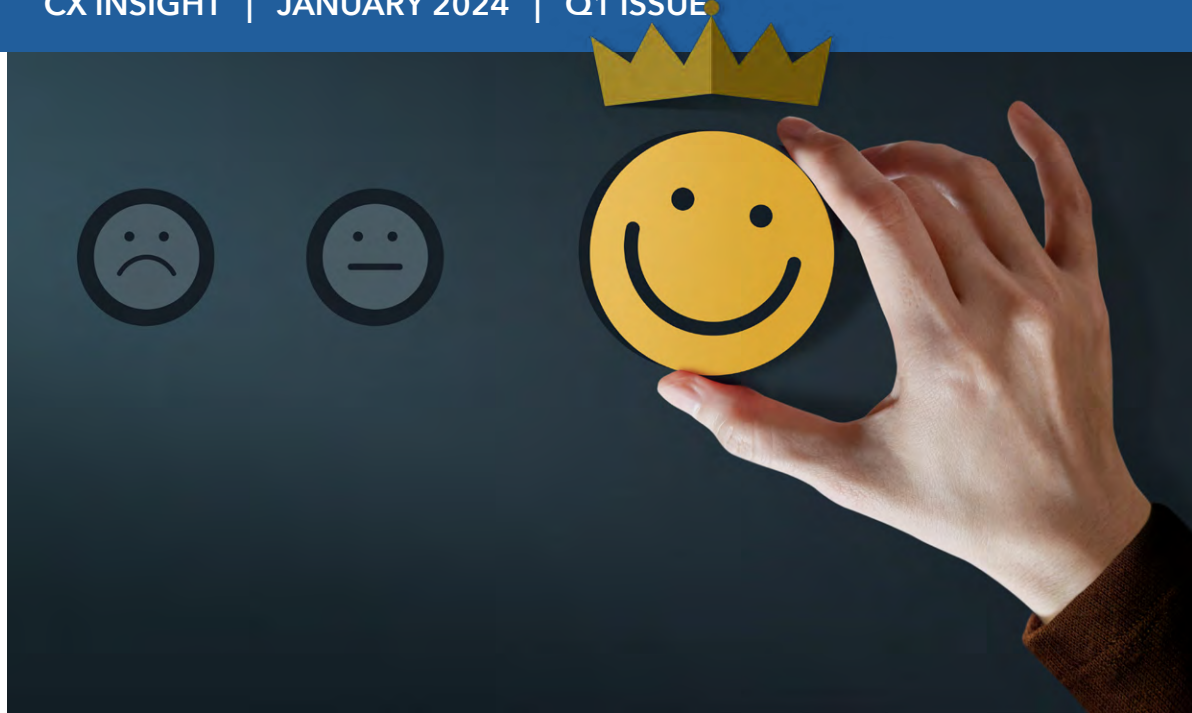
As businesses collect more data to feed their predictive models, the risk of breaching user privacy increases. Consumers are becoming more educated on data privacy matters, leading to heightened sensitivity about how their data is used and shared. This sentiment is reflected in [Zendesk's CX Trends report](#)<sup>3</sup>, which indicates a significant gap between the desire for personalized experiences and trust in businesses to protect personal data.

## Navigating the Privacy-Personalization Paradox

The privacy-personalization paradox is the need to leverage customer data for personalization while respecting the individual's privacy. The resolution lies in transparency, consent, and control. Companies must be transparent about what data they collect and how it is used. They need to obtain explicit consent from users for the collection and analysis of their data. Furthermore, giving users control over their data – allowing them to view, edit, and delete their information – can help build trust.

## Adopting Privacy-First Personalization

To continue benefiting from the advantages of predictive personalization while maintaining customer trust, businesses must adopt a privacy-first approach. This involves implementing data protection measures like encryption, regular audits, and following regulations such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA).



Moreover, employing differential privacy techniques can help businesses extract useful insights from datasets while minimizing the chances of identifying individual users. AI algorithms can be designed to work with anonymized datasets, thus reducing privacy risks.

## Building Trust Through Ethical AI Practices

Ultimately, the successful hyper-personalization of the customer experience with AI requires a foundation of trust. Businesses must commit to ethical AI practices, ensuring that their predictive models do not inadvertently compromise user privacy. This means setting up ethical guidelines for data use, involving stakeholders in the discussion, and continually monitoring AI systems for potential biases or privacy issues.

## Initiating CX Transformations

Shifting to predictive analytics in CX is gradual. Many organizations continue to rely on traditional surveys to understand customer opinions. However, there is significant opportunity for CX leaders to elevate their programs.

Here are four essential steps to initiate a CX transformation using predictive personalization.



## 1. Cultivate a New Mindset

The move to predictive insight will bring challenges, including a fundamental shift in mindset for both CX teams and their leaders. Often, leaders might view predictive analytics as the responsibility of IT or data science departments. However, the role of a CX leader is becoming more data-centric, much like their previous focus on single CX metrics. Some organizations might have experience with basic regression analyses on key performance indicators, but now is the time to think more expansively and systematically rather than just experimenting with data.

As predictive analytics gain traction, CX leaders should spearhead this shift in perception. They must adapt to their evolving roles and reestablish their organizational positions. The CX team will lead the charge in setting the direction and strategy, but gaining support and enthusiasm from relevant stakeholders is crucial for maximizing impact.

## 2. Eliminate Barriers

CX departments sometimes inadvertently create isolated silos within a company. Leadership should strive for greater integration with other organizational departments to transition effectively. Data ownership will span various departments like operations, marketing, finance, and technology. Therefore, engaging with top-level management is critical for smooth data access and control.

While data scientists will handle the algorithmic work, the CX team's role in setting the direction and strategy remains vital, along with ensuring stakeholder engagement for broader impact. Cross-functional collaboration is key to developing and scaling future CX insights.

## 3. Improving Accuracy

Most companies struggle with data quality and availability. Fortunately, organizations can start with basic customer data. The initial step involves collecting individual customer operational and financial data. A mix of customer profiles and

digital and physical interactions often provides a solid foundation. Teams should develop a comprehensive journey taxonomy, identifying all possible customer satisfaction drivers.

This taxonomy aids in forming hypotheses, leading to the identification of new measurable attributes for the predictive model. These attributes can range from quantitative aspects like annual spending to binary factors like online or in-store purchases. Comparing these features with initial hypotheses helps identify data inaccuracies and refine data collection strategies.

If certain data features are missing, teams might consider acquiring new data sets or implementing new ones to collect necessary data. As the algorithm processes more data and yields insights, the data sets will become increasingly robust, proving useful in various enterprise applications. Companies can integrate data from various sources along the customer journey, including communications, social media, and apps, while adhering to privacy and cybersecurity norms. Protecting customer data and ensuring fair, unbiased algorithms are critical responsibilities of CX leaders. In the initial phase, it's important to have a clear plan for applying the insights and to focus on specific use cases that can yield immediate benefits.

#### 4. Prioritizing Use Cases

Predictive, data-driven systems allow CX teams to link CX strategies to measurable business results directly. Having a defined strategy for using these insights is crucial, concentrating on selected use cases that can deliver quick value. Organizations can evaluate their major opportunities and challenges within existing customer journeys and consider how predictive systems can develop or enhance new solutions.

These improvements can impact key areas such as customer loyalty, service costs, and opportunities for cross-selling and up-selling.

Transitioning to a predictive approach in CX requires a change in mindset, breaking down organizational silos, starting with foundational customer data, and focusing on high-impact use cases. This strategy facilitates a smoother shift and aligns closely with broader business goals and customer satisfaction.

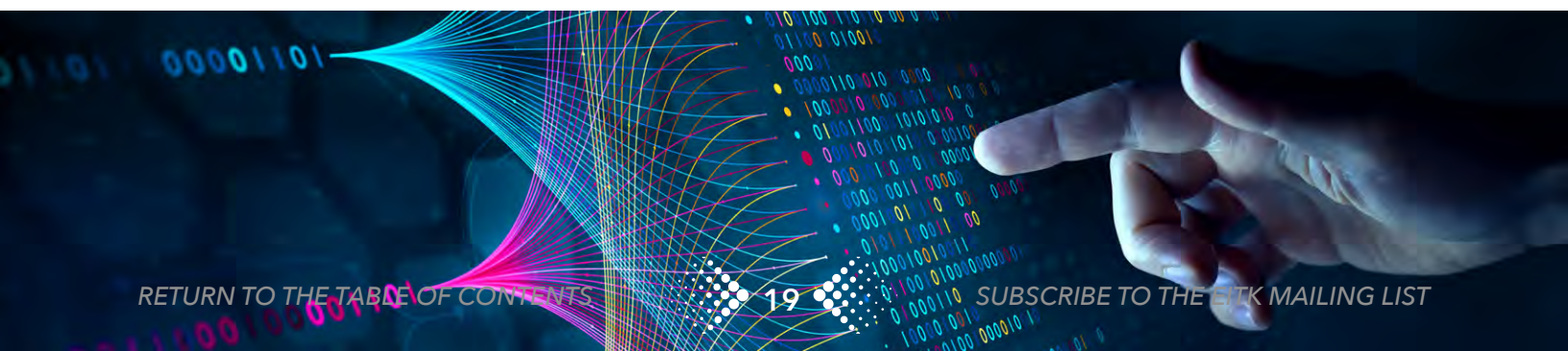
### What Lies Ahead

In conclusion, the intersection of predictive analytics and CX heralds a new age of hyper-personalized services, where businesses can respond to customer needs and anticipate them with remarkable precision. Companies embracing this data-driven, AI-enhanced approach can expect to forge deeper, more meaningful connections with their customers, improving satisfaction and loyalty.

However, this technological leap forward comes with the responsibility to navigate the privacy-personalization paradox thoughtfully. Organizations must balance leveraging data for personalized experiences and upholding the highest privacy and ethics standards. By investing in robust data management, fostering cross-departmental collaboration, and committing to transparent and ethical AI practices, businesses can set themselves apart and deliver a CX that is not just personalized but predictive and profoundly engaging.

### Links

- 1 <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/prediction-the-future-of-cx>
- 2 <https://cxtrends.zendesk.com/>
- 3 <https://cxtrends.zendesk.com/>



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Senior VP, Customer Success



**David Pitsch**  
VP, Guest Services



**Nick Chong**  
Chief Customer Officer



**Tracy Sedlak**  
VP, Customer Success

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### SAVE THE DATE

Palm Springs, California

September 24-26, 2024 | JW Marriott Desert Springs Resort & Spa

In Palm Springs, we will be releasing the 2024 CX Leaders Trends & Insights Consumer Edition report. This report includes several years of trending consumer data that depicts the opinions and experiences of your customers in several key areas, including the multichannel journey, self-help solutions, and their CX expectations. It's one of our most highly anticipated reports of the year!



# BRAND SPOTLIGHT

## Microsoft

Carlos Castano is a seasoned customer success leader boasting over two decades of expertise in driving transformative outcomes. With a rich background marked by a relentless pursuit of excellence, he has consistently empowered global teams to push beyond limits and achieve their fullest potential. Throughout his career, Carlos has been a beacon of inspiration, fostering talent development and steering teams toward success. His leadership approach can be summed up by three fundamental principles: a steadfast emphasis on Progress, an unwavering commitment to Stay Positive in all endeavors, and a resolute dedication to Always Do the Right Thing, championing the well-being of people, customers, and the business alike.

In this interview, Carlos shares his transition from Cisco to Microsoft, driven by Microsoft's customer-centric ethos, inclusive culture, and commitment to delivering exceptional experiences. He underscores the pivotal link between employee experience and superior customer service, advocating for reducing friction, empowering employees, and fostering engagement within the workforce. Additionally, he highlights Microsoft's consultative approach to customer success, focusing on tailored solutions and collaborative execution to achieve customer objectives.



**CARLOS CASTANO**

Sr. Director, Customer Experience & Success



As for my current role, I have the privilege of leading our Business Excellence & Experience (BE&E) team within CE&S Business Operations & Programs. In this role, my team and I are entrusted with shaping the strategy and execution of analytics solutions, continuous improvement initiatives, and customer experience programs. We aim to empower our support professionals, enabling them to deliver their best work and consistently provide exceptional customer experiences.

**Execs In The Know (EITK): Please share a little about your background and how you came to be at Microsoft, and describe the day-to-day focus of your current role regarding customer experience.**

**Carlos Castano:** In 2021, I transitioned from a 20-year tenure at Cisco to join Microsoft's Customer Experience & Success (CE&S) organization. This decision was shaped by three key factors that deeply resonated with me:

Firstly, during my previous role in High Touch Services, I had the privilege of Microsoft being one of my customers. Later, as the leader of Cisco IT's global end-user computing and employee support experience, I closely collaborated with Microsoft as one of our strategic suppliers. In both experiences, I was genuinely impressed by Microsoft's customer focus, integrity, and eagerness to establish strong partnerships.

Secondly, I was inspired by Microsoft's inclusive, customer-focused, and growth mindset culture. After conversing with various Microsoft colleagues, it became clear that this was a company I wanted to be a part of.

Lastly, I found myself inspired by Microsoft's CE&S charter, responsible for the strategy, design, and implementation of the Microsoft end-to-end customer experience. This charter reflects our collective ambition to delight customers and exceed their expectations in every interaction.

**EITK: What are some of the most important experiences and insights you've gained throughout your career, and how are they shaping your work for Microsoft?**

**Carlos:** Here are three experiences that come to mind that have shaped me as a Customer Experience (CX) leader:

**Great CX Starts with Employee Experience (EX).** I firmly believe that creating great customer experiences begins with employee experience.

Here at Microsoft, one of our key leadership principles is "People First: We take care of our people, so our people can take care of our customers." Additionally, when thinking EX, I like to approach it in three dimensions:

- 1. Reducing Friction/Effort:** Our goal is to make things as easy as possible for our employees to enable them to excel in their roles. We continuously work on eliminating friction from our processes, systems, and tools.
- 2. Trust and Empowering Our People:** Empowered employees are more likely to be engaged and contribute to creating exceptional experiences. Plus, it's the right thing to do.
- 3. Fostering Employee Engagement:** Engagement promotes passion, commitment, and productivity. Engaged employees genuinely care about their work and their impact on the company's success.

**Walk in Your Customer's Shoes.** To truly understand and improve the customer experience, putting ourselves in our customers' shoes is crucial. This seemingly simple practice can yield transformational insights. For instance, when was the last time you personally opened a case with your support team to experience the process or spent a day reviewing customer survey feedback verbatims? I guarantee that you will get multiple great improvement ideas when you do. This approach is particularly important in larger corporations where many team members primarily interact with internal colleagues. A guiding principle to stay customer-focused is to consider "Our most important customer as the next person downstream in our value chain."

**Cultivate a Culture of Continuous Improvement.** Operational excellence doesn't mean achieving perfection but maintaining discipline, focus, and passion for continuous improvement, always with the customer at the forefront. I once had a leader who instilled in me the importance of persistently addressing problems at their root. Looking back, this has been one of the most valuable lessons in my career. In today's world of services and support, it's easy to move on once a situation is mitigated. However, truly delving into rootcauses demands discipline. Neglecting this can lead to issues resurfacing in different regions or with different clients.

**EITK: Company policies and processes play a major role in shaping the customer experience. How has Microsoft evolved these aspects of its business, and how have they impacted things like resolution rate, customer satisfaction, and customer effort?**

**Carlos:** First and foremost, our policies and processes are grounded in our privacy commitments to ensure our customers' and employees' privacy and their data are always safe.

Furthermore, we continuously evolve our processes, objectives, and measurements, focusing on simplification and adaptability to deliver exceptional customer outcomes. Experience shows us that with the customer in mind, well-designed efficiency improvements will lead to improved customer experiences (e.g., lower effort, improved resolution effectiveness, improved satisfaction and sentiment).

**EITK: How would you describe Microsoft's culture, values, and overall mission in serving its customers?**

**Carlos:** At Microsoft, our "big why" and mission is to empower every person and every organization on the planet to achieve more. Achieving our mission requires us to embrace and commit to our culture, which is our "how." It all starts with adopting a growth mindset – a passion to learn and bring our best every day to make a bigger difference in the world. It's about curiosity, seeking feedback, and learning from mistakes. Supporting our "growth mindset" culture, we embrace three key attributes:



- **Customer-obsessed:** We prioritize understanding our customers' perspectives and listening with empathy to advocate for their needs.
- **Diverse and inclusive:** We value diversity and inclusion, actively seeking out and embracing differences in backgrounds, experiences, and perspectives.
- **One Microsoft:** We emphasize working together, focusing on what's best for the team.

Finally, our core values, including respect, integrity, and accountability, guide how we interact and sustain our culture.

### **EITK: What does a common customer success engagement look like for the brand?**

**Carlos:** Our customers' success is at the core of who we are. We exist because of our customers and are driven by a clear principle: to help them realize the full potential value of their Microsoft investments.

Our preferred approach follows a consultative model that ensures our technology serves our customers' business outcomes.

Our customer success journey begins with attentive listening to understand our customers' needs and objectives. Subsequently, we focus on designing the right solutions to help realize these outcomes. To operationalize this approach, we collaborate closely with our customers to establish a Customer Success Plan (CSP). And, with our Microsoft Unified service, we mobilize our talent to seamlessly bridge the CSP with delivery execution, thereby expediting the realization of value.

To close the loop, we advance to the manage and optimize phase, where we concentrate on ensuring the ongoing health of the solution and driving continuous improvement through our Microsoft Unified proactive and reactive services.

### **EITK: For many organizations, the past year has been filled with challenges and many big and small wins. Looking back over the past year so far, which success has meant the most to you?**

**Carlos:** Reflecting on the past year, I am proud of our strides in harnessing AI technology to drive real-world impact. While AI has been a topic of discussion for years in our industry, I believe that we have now reached an inflection point where AI's promises are becoming a reality.

In Microsoft's Customer Service & Support Team, which serves over a billion customers globally, we have successfully enabled Microsoft Copilot in our Dynamics 365 Customer Service environment. The Copilot AI capabilities, powered by large language models, are proving to be a game-changer in enhancing the productivity of our support agents and engineers, leading to faster and superior customer experiences.

Here are a couple of examples:

- **Case Summarization:** Our engineers can use Copilot to generate concise case summaries rather than sift through extensive case histories to understand an issue. This enables them to rapidly grasp the situation and formulate effective problem-solving strategies.
- **Knowledge-Base Effectiveness:** Customer support often involves navigating through multiple knowledge bases, articles, and case histories to identify relevant solutions. Copilot has proven invaluable by synthesizing vast amounts of information from various systems, enabling our engineers to quickly access pertinent articles that have helped resolve similar issues.





In short, AI is enabling our engineers to focus on what they do best, helping customers resolve complex issues while Copilot streamlines tasks, saving them valuable time in the process.

**EITK: Which CX trend or technology are you most intrigued by diving into 2024, and what should every CX leader be tracking?**

**Carlos:** AI is undoubtedly becoming a game-changer in our industry, and I foresee significant developments in the coming year. The barriers to AI adoption will be lower, making AI capabilities more prevalent across the products we use and procure.

In our customer support field, I anticipate that most of the advances in the next year will be geared toward enhancing productivity and new data and AI job creation. Companies that embrace AI and seize this opportunity will likely gain a substantial competitive edge over their peers.

**EITK: Can you share how your involvement in the EITK community, including Know It All "KIA," translates into value for yourself, your organization, and the CX community at large?**

**Carlos:** Continuous learning from diverse industry experts has been incredibly valuable to me. Whenever I engage in EITK forums, I gain fresh insights and ideas from peers with diverse backgrounds and experiences. Equally rewarding is knowing that my insights have positively impacted colleagues as they navigate their journey to enhance their CX/EX strategies and contribute positively to their workplaces.



**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 Carlos Castano and the entire team at Microsoft for contributing to the Execs In The Know Brand Spotlight.

Interested in taking part in a future Brand Spotlight feature and sharing your story?

Contact us at [info@execsintheknow.com](mailto:info@execsintheknow.com).

# 2024 Execs In The Know CX Leadership Opportunities

Execs In The Know is dedicated to advancing customer experience (CX) excellence and offering unique platforms to empower leaders with valuable insights and drive innovation in the ever-evolving landscape of customer-centric strategies.

Here are three ways for leaders to easily plug into Execs In The Know events and the vast expertise of your CX peer leaders.

## CX Executive Roundtables: Unparalleled Networking & Knowledge Exchange

Ideal for Senior leaders, our Executive Roundtables are small, intimate, and collaborative forums to share experiences, challenges, and successes. These invite-only gatherings bring together a select group of your CX peer leaders and topic experts to facilitate open and real discussions on the latest trends, best practices, and innovative solutions. Attendees benefit from deep dives into specific CX topics, gaining actionable insights that can be directly applied to their organizations.

## CX Executive Briefings: Timely Industry Updates on CX Trends & Innovations

Our live and virtual Executive Briefings are tailored to discuss timely updates on the latest CX trends, technologies, and innovations. Joined by 20-30 of your corporate peer leaders and 3-5 expert panelists, our goal is to deliver a concise overview of key developments, dig into emerging technologies, discuss evolving customer expectations, or review use cases. Leaders benefit by walking away with the knowledge to make informed decisions, align strategies with industry shifts, and maintain a competitive edge in the dynamic CX landscape.

## CX Leader Webinars: Accessible Learning for CX Leaders Worldwide

Our CX Leader Webinars cover diverse topics on customer experience and provide convenient live and on-demand learning with a key focus on relevant challenges and solutions delivered by top industry experts and valued partners. Whether a use case walk-through, discussing a timely industry challenge or specific CX leader roadblock, our webinars offer a simple, topic-selection learning library at your pace and on your time.



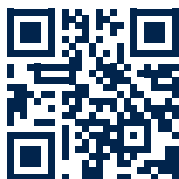
It's a community like no other! The CX Executive Briefings are a wonderful opportunity to share in thoughtful conversation on the changes we are seeing in the Contact Center space. The small group setting allows for open and authentic discussions, sharing experiences, best practices, and networking with leaders who are passionate about delivering an elevated experience for our customers and our team members."

- Lori Stewart, Director, Customer Experience and International Reservations American Airlines

## Upcoming Events:

**CX LEADERS WEBINAR**  
2024 CONTACT CENTER EXCELLENCE: USING REAL TIME AI-DRIVEN INSIGHTS FOR SEAMLESS OMNICHANNEL ENGAGEMENT & RESOLUTION  
January 30, 2024 | 1:00 PM ET [Register Now](#)  
LAURA BASSETT CHAD MCDANIEL  
Execs In The Know sharpenCX

Execs In The Know  
**VIRTUAL EVENT**  
From Conversation to Reality: Rapid-Fire AI for CX Use Cases  
FEBRUARY 29, 2024 | 11:30 AM - 1:30 PM ET  
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# Moving Beyond Customer Experience and Employee Experience to Total Experience

by Execs In The Know

## Could a shift to Total Experience (TX) be part of your organization's future?

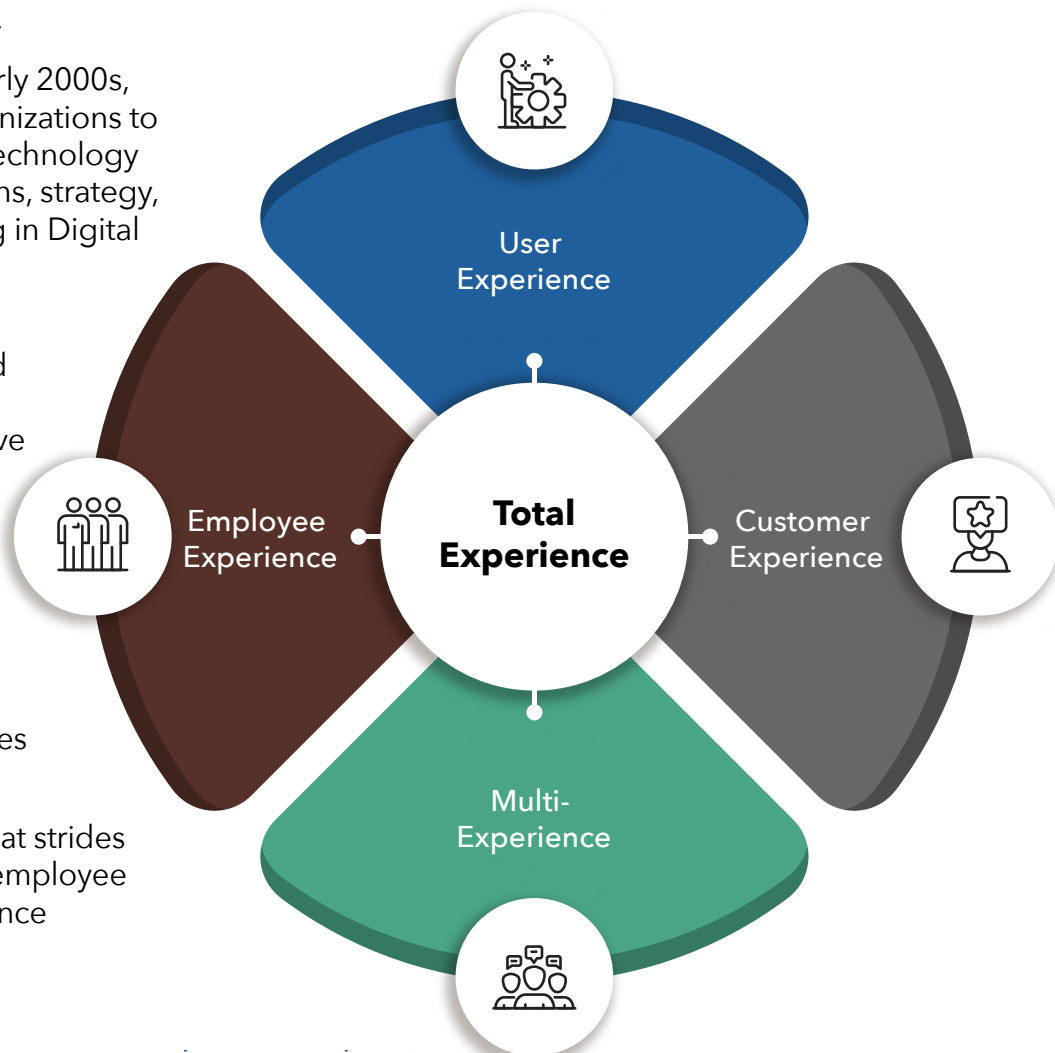
When organizations understood and embraced the idea that customers were seeking enriching and immersive experiences beyond the basic functional benefits of a product or service, the Experience Economy was born. Investment and work shifted to projects designed to create and deliver engaging, meaningful, and memorable experiences in every interaction.

Around the same time in the early 2000s, rapid advances influenced organizations to embrace and integrate digital technology into various aspects of operations, strategy, processes, and culture, ushering in Digital Transformation.

The outcomes of these revolutions can lead to increased competitiveness, improved satisfaction, and an ability to thrive in a rapidly changing business landscape. As Customer Experience (CX) leaders, we play a pivotal role in these two modernizations in today's business world. Both are core to our work and rooted in the mandate to transform experiences and drive business growth.

We have undoubtedly made great strides in improving our customer and employee experiences, driving the Experience

Economy forward. We have also seen dramatic progress in advancing the Digital Transformation agenda. But as CX leaders, we must look back on our body of work, account for the changes in how business is done, and consider that we may need to expand our focus to seize an incredible opportunity to be even more effective.



## Presenting the Total Experience

Total Experience (TX) takes a holistic approach that considers several aspects across the domains of CX, Employee Experience (EX), User Experience (UX), and Multi Experience (MX)<sup>1</sup>. It is the sum of all experiences and impressions an individual has throughout their journey with a company, including online and offline interactions, customer support, physical encounters, and digital interfaces. TX acknowledges that these dimensions are interconnected and collectively contribute to customers' and employees' overall impression and satisfaction across all touch points in their respective journeys.

TX promotes a holistic and cohesive approach to designing and delivering experiences and returns a more significant impact on satisfaction, loyalty, and the overall success of a brand than looking at experience domains individually. Although the effort to focus on TX may be greater than working on individual disciplines, the rewards are richer. When considering these aspects integrated, organizations can create a more complete and positive overall experience.

Gartner predicts that by 2026, 60% of large enterprises will employ a TX strategy to transform their business models and achieve "world-class customer and employee advocacy levels" where both groups are motivated to promote the corporate brand<sup>2</sup>.

## Understanding the Benefits of TX

With a shift to a TX focus, having a strong understanding and being able to stand for the upside is an important first step. When woven together, the four disciplines add exponential value when compared to addressing each individually. The sum of the whole experience is a key difference from simply looking at the domains singularly. The work will yield more comprehensive and powerful benefits to the organization, customers, and employees.

Imagine the operational impacts of transforming the TX. Organizations can expect dramatic improvements in several key performance indicators (KPIs). Improved customer and employee satisfaction, increased customer and employee confidence, higher retention, and stronger advocacy are notable benefits of TX-focused efforts. "Consider this not as a linear process but a circular process in which elevation in employee experience empowers employees to enhance customer experience, and improved customer satisfaction enables better alignment of your employees toward overall business goals."<sup>3</sup> Additionally, TX transformation will increase brand perception, reputation, and loyalty.



Expanding to a TX focus will also result in positive organizational impacts. By design, TX efforts will substantially increase internal collaboration and cross-functional work, likely reducing the risk and cost of individual efforts. This teamwork will provide a more comprehensive view of the total experience the organization is delivering; TX work will help leaders know what is actually happening across the entire experience, providing more comprehensive and actionable insights. This knowledge and more inclusive group effort can lead to better product and service design and delivery.

This shift may also help organizations become more resilient and drive innovation and adaptability. When employees from different parts of the organization work more closely and have a broader view of how products and services are developed and delivered, they are more attuned to how important collaboration is and how interconnected their work is with other teams. This cross-training and awareness offer a competitive advantage over fragmented efforts that seek to improve work in a single domain or are limited by scope and span of control.

## Starting the TX Shift

For organizations and leaders already invested in experience-improvement strategies, getting started in TX requires expanding thinking and efforts. The approach, however, should feel familiar since it follows a similar pattern to starting up a CX or EX program.

It all starts with culture. Initiating a cultural shift to expand from work to improve individual disciplines to targeting the TX is key. And the recommended approach to kickstart this effort starts at the top. The shift can permeate the organization once leadership has bought in and established the mandate. The vision should come from the top down, and the mandate must be communicated at the beginning of the journey and along the way.

Teams should receive regular and consistent communication regarding the vision, the approach, the driving factors for the shift, regular progress reports, and the next steps. Spreading knowledge, getting buy-in, and aligning coordination between the business, operations, and IT is critical to success. Teams charged with improving an aspect of CX or EX should bring in experts from other experience disciplines to increase knowledge and improve overall outcomes.



Establishing a core location and process for this work should follow. A place to analyze, design, test, and learn (such as a TX center of excellence) will bring together a fusion team of employees that spans all four disciplines. This will accelerate collaboration, learning, and results. The most effective organizations isolate this testing in a controlled environment to minimize the risk of disruption to existing operations.

When building the TX transformation team, organizations should thoughtfully consider the unique departments represented and the skills of these team members. Employees skilled in design-led thinking, journey mapping, analytics, data science, and process will collaborate to identify problems and propose creative solutions. This team must also be curious and passionate about expanding to a TX view.

And this team needs a powerful tech stack to capture, analyze, and lead them to data-driven insights. Much like the technology infrastructure needed for a strong CX program, the stack should include components that power:

- Data collection from various sources, including interactions, websites, social media, surveys, and other areas, is essential to understanding behavior and sentiment across touch points.
- Data integration from diverse sources across the journeys to combine elements and identify patterns that are not easily identified when viewed in isolation.
- Advanced data analytics to efficiently process and analyze large volumes of data, preferably with machine learning and artificial intelligence (AI), to identify trends, correlations, and predictive insights.
- Personalization to deliver custom experiences that consider what is known about the customer and employee, preferences, and behavior to make every interaction memorable.
- Automation of routine and rote tasks to free up agents to concentrate on more complex interactions and deliver customized experiences.

## The Experiences

### Customer Experience (CX)

The overall perception and interaction a customer has with a brand across their entire journey. CX encompasses all touch points, interactions, and feelings a customer has with a business.

### Employee Experience (EX)

The overall experience and perception of employees throughout their tenure with a company. It includes all touch points, interactions, and feelings employees have with the company.

### Multi Experience (MX)

The approach to creating digital interactions and interfaces that extend beyond traditional desktop or web applications. It encompasses the idea of providing users with a seamless and consistent experience across various digital touch points and devices.

### User Experience (UX)

The overall experience a person has when interacting with a product, system, service, or interface, typically in the context of digital technology. It encompasses all aspects of the user's interaction, including their feelings, perceptions, preferences, and ease of use.

### Total Experience (TX)

The comprehensive and all-encompassing experience an individual has with a product, service, brand, or organization, considering all the touch points and interactions involved. Simply, total experience is the sum of all experiences defined above.

Also akin to the technology needed to power a leading CX program, the optimal stack to support TX initiatives must scale, keep customer and employee data secure, collect and analyze real-time and previously collected feedback. It should empower teams to use visualization and reporting to help tell the experience story.

While a powerful tech stack can provide the infrastructure for data-driven insights, it's important to note that technology alone cannot deliver on the mandate. Successful TX practices also require a solid long-term strategic plan and requisite funding. A data-driven culture, skilled teams to imagine and design future interactions and be storytellers of what the data reveals, and a strategy for translating insights into actions that improve overall experiences are also critical components.

## Defining the Role of the CX Leader

CX leaders have a unique opportunity to take a lead role in introducing and directing this emerging discipline in their organizations. And, like other initiatives, the starting point is clear: build the case! Start with creating an understanding of TX and specific examples where the approach could be applied across the enterprise to help bring this future focus to life. CX leaders are primed to spearhead the culture shift. It is important to socialize the case across the organization to get input and buy-in, paying particular attention to highlighting the increased rewards of an expanded focus.

Part of the case should identify employee engagement and training and development needs to build the team to lead this innovation. Identifying what teams need to learn and do differently when taking on the TX versus CX or EX individually is part of the business case. Finally, leaders should align business goals with experience goals, measure progress, and communicate the results of the efforts.

CX leaders should also identify a place for the TX expansion work. They can create, repurpose, or refocus a testing environment to foster cross-functional collaboration and begin efforts to examine and transform the TX. A low-risk approach is to start small: look at one or two interactions that could benefit from a more holistic view. Learn from small applications and build momentum from there. A good place to start identifying

the interactions that need the most attention is to gather existing or planned CX and EX projects or initiatives. Leaders can then determine which of these are worth expanding to a TX view.

Seasoned leaders understand the importance of implementing technology to support people and process efforts to improve experiences. Leaders should examine the existing tech stack and identify investments in technology that support seamless and integrated experiences for customers and employees. Understanding how in-place systems – including customer relationship management, collaboration, and measurement tools – can be expanded to support TX is essential to this assessment. From there, leaders can better understand what is needed and create a plan for acquiring and implementing that additional technology.

A critical part of all successful initiatives includes listening to the voices of customers, employees, and other key stakeholders and leaders. When setting the course for a future targeting TX improvement, a discovery process to identify strengths, opportunities, and expectations is often an eye-opening and valuable exercise. Leaders can blend information learned in this voice discovery exercise with operational data and other sources to identify the biggest opportunities and make data-driven decisions.

## Recapping the TX Opportunity


Opportunistic organizations that want to differentiate their customer experiences should consider expanding to a TX focus. Although the discipline is relatively new, the time is now to start investigating this shift. Leaders need to understand what it would take to adopt a TX strategy to create a more positive and

*When woven together, the four disciplines add exponential value when compared to addressing each individually.*

integrated ecosystem for customers and employees – contributing to increased organizational success and long-term sustainability and relevance for the brand.

This approach is more powerful than looking individually at each domain. It can drive many of your existing experience-improvement initiatives. “By thinking about and enabling experiences holistically,

organizations have a much better chance to move the needle on the business outcomes they desire, whether that’s enhancing customer satisfaction, creating a healthy and productive work environment, improving product and service quality, or increasing brand loyalty.”<sup>4</sup>

When examining strategies to accelerate growth, TX deserves a hard look as a precursor to popular single-focus initiatives like AI- and machine learning-powered customer service, proactive customer engagement, and other industry trends. These important initiatives will be the foundation to delivering a transformed TX, but from a more complete view and with increased involvement across the organization that leads to more comprehensive results. Could a shift to TX be part of your organization’s future? 

## Links:

- 1 <https://www.fastcompany.com/90956877/total-experience-transformation-five-strategies-for-a-seamless-customer-and-employee-experience>
- 2 <https://www.gartner.com/en/webinar/445952/1051272>
- 3 <https://www.forbes.com/sites/forbestechcouncil/2022/04/29/breaking-down-silos-to-create-a-360-degree-total-experience-strategy-through-conversational-ai>
- 4 <https://www.forbes.com/sites/forbestechcouncil/2022/04/29/breaking-down-silos-to-create-a-360-degree-total-experience-strategy-through-conversational-ai>





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# KIA ONLINE COMMUNITY MEMBER SPOTLIGHT



**TRACI LAMM**  
Senior Director, Customer  
Experience, Forbes

Delving into the world of customer experience (CX) and its dynamic landscape, this KIA Online Community Member Spotlight falls on Traci Lamm, the Senior Director of Customer

**Forbes**

Experience at Forbes. In an insightful interview, Traci shares her unconventional journey into the realm of CX, highlighting the critical need for educational emphasis on CX careers from an early age. She sheds light on Forbes' strategies, its ongoing CX transformation, and the importance of integrating technology and analytics.

Additionally, she underscores the company's approach to creating memorable customer experiences and the pivotal role of community engagement in shaping her career. Join us as we uncover her perspectives, experiences, and vision for fostering exceptional CX within Forbes and the industry at large.

**Execs In The Know (EITK): Did you always want to work in Customer Experience? How did you get to where you are today?**

**Traci Lamm:** It's funny. I get asked this all the time, and my answer is always the same. No! I didn't know Customer Experience was a career path when I was trying to figure out my future as a young adult. I thought I had to be an accountant, or a lawyer, or something grand. Looking back on my career path, though, it was a divine path that I was put on, and I wouldn't have it any other way. I do wish more high schools would talk to students about careers in CX, though.

**EITK: From your perspective and experience, what are the key levers of a successful customer experience transformation, especially as they relate to unlocking growth potential, improving CX, accelerating the rate at which a brand innovates, and building new capabilities?**

**Traci:** It depends on the company that you are transforming the CX for. Each organization is unique, and the CX goals and plans should be based on the company's goals and brand. But in general, transformation starts at the top and bottom. Your C-suite needs to be supportive and on board with the transformation plan just as much as the agents and CX employees need to

be on board and understand the plan. The whys behind why the transformation is happening. They also need to be involved. It is less scary or disruptive if they are involved in the process. Then comes the back up to the transformation through technology and data. So, in general, strategy, people, technology, and analytics.

**EITK: In what ways is Forbes applying AI to improve customer service, enhance operational efficiencies, or drive customer value?**

**Traci:** Right now, we are just in the infancy of looking into AI. We know we need a solution; we are just still exploring what and where we want to implement one.

**EITK: The last few years have brought unprecedented challenges, opportunities, and evolution for companies of all sizes. What have been Forbes' biggest wins and challenges from a customer experience and operational standpoint?**

**Traci:** In a lot of ways, Forbes was in a position where the pandemic and other recent events didn't impact the old CX much at all. We were already working with outsourced remote providers and working from home. However, all those efforts were siloed and disjointed from a true Customer Experience perspective. We are now in the process of pulling all CX functions under one org and knocking down those silos. And that is the biggest win: getting the entire company on board with understanding the need not to be siloed has been huge.





**EITK: A consistent commitment to outstanding service is essential. When creating unforgettable customer experiences, no detail is too small. In what ways does Forbes seek to “wow” its customers?**

**Traci:** We are still working on the “wow” at Forbes. However, part of the plan is the personal touches that you can develop by knowing your customers better. Birthdays and anniversaries – both personal and as a customer, gifting, bundling of products to help customers save a little, etc.

**EITK: Are there any interesting facts you can share about working for Forbes that most consumers don’t know?**

**Traci:** Believe it or not, we are a small company in the grand scheme of companies that have been around as long as Forbes. We have less than 700 employees! We are small, but mighty!

**EITK: Most of us can look back and remember less-than-ideal experiences we’ve had as customers. However, even more memorable are those times when a company’s customer service exceeds our expectations – even delights us. What has been your most delightful customer experience to date?**

**Traci:** I forgot to pack an umbrella on a recent work trip to New Jersey. I was talking with the front desk clerk when I was getting ready to leave to walk to the office and mentioned I would be a drowned rat by the time I got there. She asked me to wait a few minutes and entered the back office. When she returned, she had her personal umbrella and told me to use it for the remainder of my trip and just to leave it with the front desk when I checked out if she wasn’t there. I was so incredibly grateful. I do a lot of walking when I am in New Jersey’s offices and was unprepared for the amount of rain coming down. She made my trip so much more comfortable and pleasant. She totally did not need to give me her personal umbrella, but she didn’t even hesitate.

**EITK: What are the three key qualities of leaders who inspire you?**

**Traci:** Approachability: I believe all leaders should be open to their employees approaching them about anything related to their day-to-day needs or wants.

Humility: Just because you are the leader does not mean you necessarily know everything. Often, people on your team have a different or better way to do something or an idea or knowledge about something you don’t or haven’t thought about. Do not take it as a competition that they do; take it as a win that you have that person on your team.

Empathy: You do not know what your team members are going through outside of work or even sometimes at work. Don’t lose sight of that.

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

**Traci:** I love live music, so my absolute favorite is going to concerts and musicals. I don’t care what kind of music; just watching someone share their gift is life-affirming for me.



**EITK: Can you share how your involvement in the Execs In The Know and the KIA Online Community has translated into value for yourself and your organization?**

**Traci:** There are so many wonderful people in the Execs In The Know community who are so open to sharing their experiences and knowledge. I love that there is always someone to reach out to when you are trying to tackle a problem. Over the years, I have learned so much from the community and have been able to find tools and resources that have helped with the various companies I have been a part of. I am not sure my career would be what it is if it weren't for this group. They have taught me so much. 🌟

“  
**I believe all  
leaders should be  
OPEN TO THEIR  
EMPLOYEES  
approaching them about  
anything related to their  
day-to-day needs  
or wants.**  
”



**Execs In The Know**

Thank you to Traci Lamm, Senior Director, Customer Experience at Forbes for her leadership, participation, and insights. To connect with Traci, or to 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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**KNOW IT ALL "KIA" MEMBERS**  
A Corporate End User Sharing Community

**Elevate your CX leadership  
journey with KIA!**

**FREE TO JOIN!  
NO FEES OR DUES**



**LEARN MORE**

Scan here to learn more  
about our community.

# WHY KIA?

Discover a thriving community where 1,000 + corporate end-user CX leaders unite! Connect with industry experts, share insights, and collaborate on niche questions.

- **Community for CX Excellence**  
Joining KIA is free and gives members access to a platform for CX leaders to exchange ideas, explore innovative strategies, and tap into unparalleled resources that elevate the customer experience landscape.
- **Connect with Peers**  
73% of KIA members are Director-level and above. Gain insights from your CX peers to help shape CX strategies.



- **Cheers to 1,000 Strong!**  
Join the vibrant KIA community and celebrate continued collaboration and success!



## JOIN KIA

### REQUEST TO JOIN:

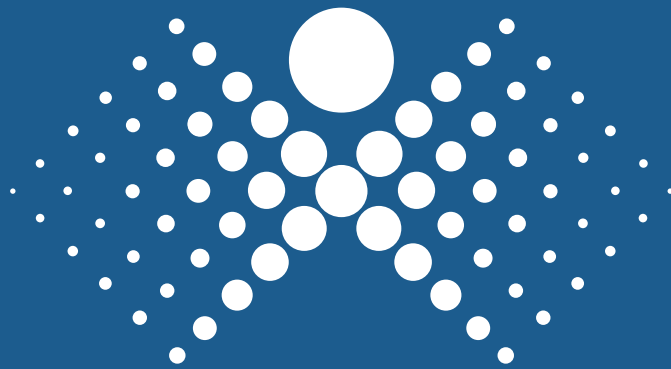
Scan here to request to join our community.

### QUESTIONS?

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

### BUSINESS PARTNERS:

Is your business interested in sponsorship opportunities in the CX Marketplace? Email Scott Moberly at [scott@execsintheknow.com](mailto:scott@execsintheknow.com)



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