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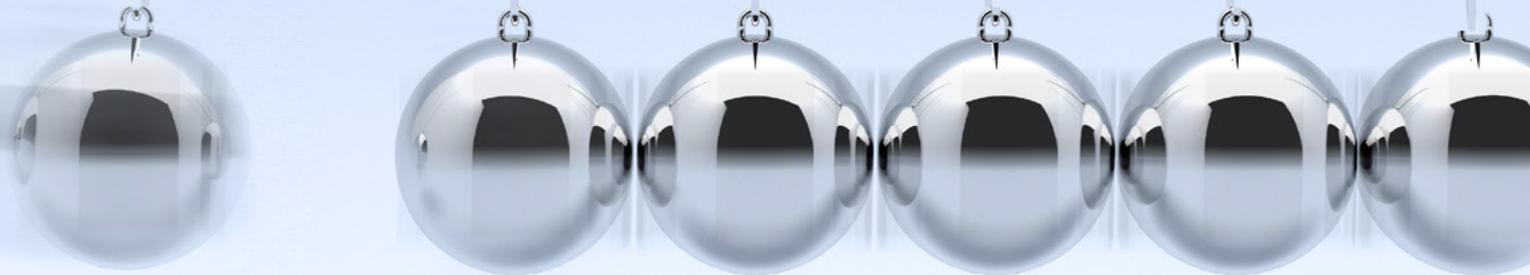


CX Insight

AN EXECS IN THE KNOW PUBLICATION

The Future of Service Excellence

Discover how feedback fuels business growth, how outsourcing adapts to new opportunities and challenges, and the ways humans can superpower AI.



The Power of Listening: Leveraging Customer Feedback to Drive Brand Success

Human-In-The-Loop:
An Intersection Of People And Technology

The Evolving Landscape of BPO Contracts

Brand Spotlight: Lovevery

in this issue

05 THE POWER OF LISTENING: LEVERAGING CUSTOMER FEEDBACK TO DRIVE BRAND SUCCESS

By adopting best practices for collecting and leveraging feedback and embracing AI and technology, organizations can enhance customer experience, build stronger relationships, and drive brand success.

13 HUMAN-IN-THE-LOOP: AN INTERSECTION OF PEOPLE AND TECHNOLOGY

The deployment of AI and automated systems in contact centers is at an all-time high and is still growing.

21 THE EVOLVING LANDSCAPE OF BPO CONTRACTS

Explore how BPO contracts are adapting to change and evolving with the dynamic needs of businesses.

27 BRAND SPOTLIGHT LOVEVERY

Every interaction is an opportunity to build better relationships with customers.

31 WHAT IS REFLECTED INTELLIGENCE?

Current AI prioritizes technology but neglects customer experience and enterprise knowledge.

37 KIA SPOTLIGHT

The more effort a customer must put into engaging with you, the less likely they will be loyal in the long run.





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Welcome

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

Shaping the future of how brands connect with their customers.

In this latest issue, the fusion of technology, innovation, and the human touch takes center stage. As you dive into the following pages, we invite you to journey through stories of transformation, resilience, and forward-thinking leadership that are shaping the future of how brands connect with their customers.

We explore the transformative power of the delicate balance between humans and artificial intelligence (AI) in enhancing customer experiences. Our exploration highlights how the fusion of technology and human touch is beneficial and indispensable in creating truly meaningful customer interactions. We also shed light on the paradigm shift from traditional cost-saving measures to strategic outsourcing partnerships that embrace flexibility, innovation, and value. Furthermore, we emphasize the profound impact of listening by providing a comprehensive article on leveraging customer feedback.

In our Brand Spotlight with Emily Sarver, Vice President of Customer Experience at Lovevery, we learn how passion and innovation can drive a brand to become a leader in its field.

For our KIA Spotlight, we sit down with Amber Fogel, former Director of Training at Vroom, to discuss scaling learning and development (L&D) programs and the impact of positive transformation and mentorship.

With each issue, our aim is to offer you inspiration, knowledge, and actionable insights. Whether you're a business leader seeking to innovate, a customer experience enthusiast looking to deepen your understanding, or simply curious about the intersection of technology and human-centric strategies, this issue is for you.

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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The Power of Listening: Leveraging Customer Feedback to Drive Brand Success

By adopting best practices for collecting and leveraging feedback and embracing AI and technology, organizations can enhance customer experience, build stronger relationships, and drive brand success.

by Execs In The Know



In today's hyper-connected world, the customer voice has never been more critical to businesses and brands' success. As markets become increasingly competitive, understanding and responding to customer feedback can be the linchpin for growth and sustainability.

This comprehensive exploration explores why customer feedback is paramount, how organizations effectively utilize it, the best practices for collecting and leveraging this gold mine of insights, and artificial intelligence (AI)'s transformative impact on customer experience strategies.

The Importance of Customer Feedback

Customer feedback is the cornerstone of customer-centricity, a philosophy that places customers at the heart of business operations and strategies. It offers a direct line to the customer's needs, expectations, and perceptions, serving as a critical tool for businesses to enhance products, services, and overall customer experience. By actively listening to feedback, organizations can make informed decisions that align more closely with their customers' desires, increasing satisfaction, loyalty, and advocacy.

Case in point: Seventy-three percent of consumers worldwide expect companies to understand their unique needs and expectations.¹

For numerous reasons, customer feedback is vital for brands, playing a critical role in shaping product development, marketing strategies, and overall customer satisfaction. Here are two examples illustrating its importance:

1. Product Development and Improvement

Customer feedback is a direct line from the consumer to the company, offering insights into what customers want and need from their products or services. For instance, a tech company might launch a new smartphone with innovative features. Through customer feedback, the company learned that while users appreciate the phone's advanced camera technology, the battery life needs improvement.

This valuable feedback prompts the company to improve battery technology in their next model, ensuring that the product meets customer expectations and remains competitive.



2. Enhancing Customer Experience and Loyalty

Customer feedback also plays a crucial role in optimizing the customer experience and building loyalty.² For example, a restaurant chain may receive input indicating that customers are unsatisfied with the waiting times and quality of service at specific locations. By addressing these issues—perhaps by implementing a new queuing system or providing additional staff training—the chain can significantly improve customer satisfaction.

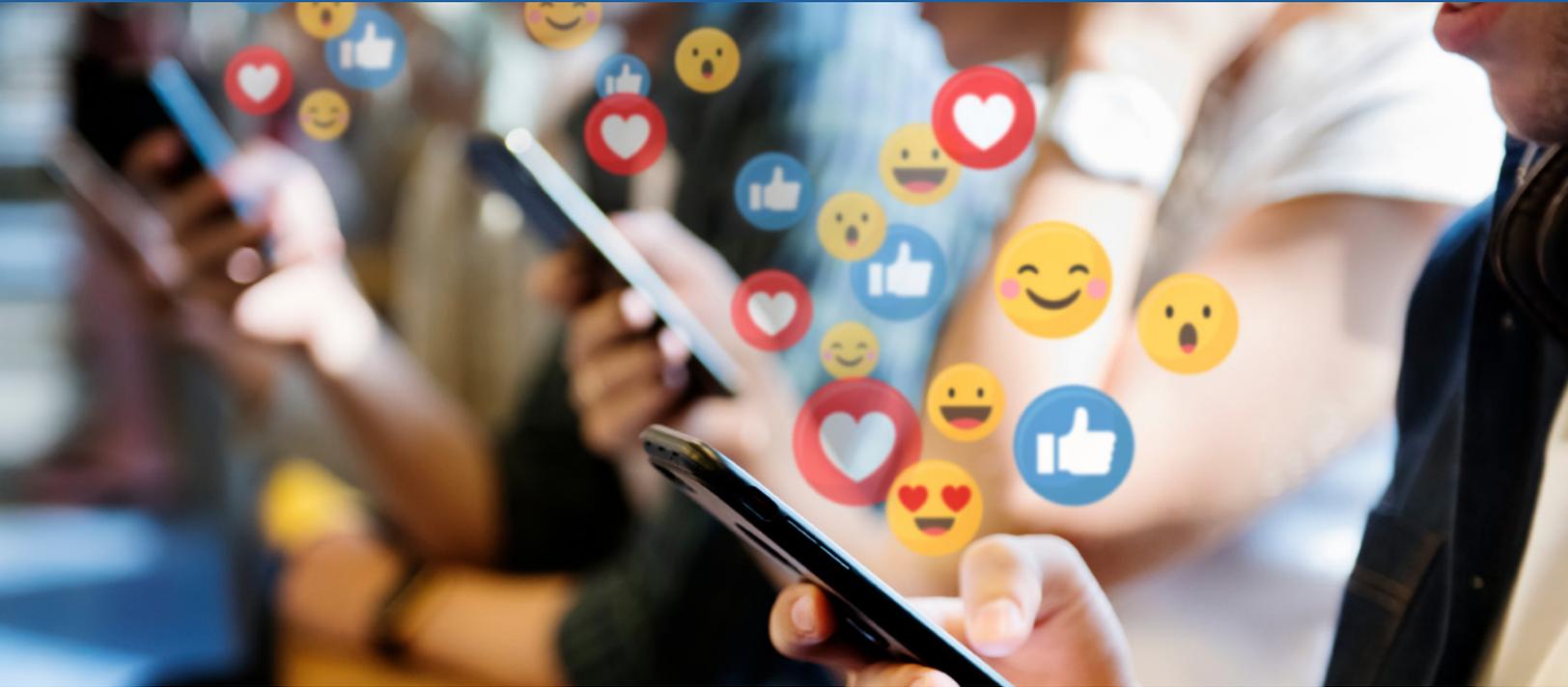
This encourages repeat business and can turn satisfied customers into brand advocates who will likely recommend the restaurant to others. In this way, acting on customer feedback resolves immediate issues and builds a loyal customer base, which is essential for long-term success.

Moreover, feedback acts as a gauge for customer sentiment, helping brands to nip issues in the bud before they escalate into more significant problems that can harm reputation and bottom line. It's also a powerful way to identify advocates and detractors, enabling businesses to tailor their strategies to convert satisfied customers into brand ambassadors and address the concerns of unhappy ones.

Strategies for Collecting and Leveraging Customer Feedback

Collecting and leveraging customer feedback is vital for brands because it is a direct line to understanding customer needs, preferences, and pain points. This invaluable insight enables brands to improve products and services, tailor customer experiences, foster loyalty, and drive innovation.

By actively listening to feedback, companies can identify areas for improvement, anticipate market trends, and make informed decisions that enhance their value proposition. Ultimately, leveraging customer feedback helps refine the business offerings and strengthens



the relationship between the brand and its customers, increasing satisfaction and loyalty. Here are a few ways brands can collect and leverage customer feedback.

Diverse Feedback Channels

It is fundamental to employ multiple channels for feedback collection. Surveys, social media platforms, customer service interactions, and website feedback forms are popular. The aim is to allow customers to share their experiences, ensuring a broad and representative feedback sample.

"I recommend retaining both call monitoring and customer surveys, as each provides distinct data points for continuous improvement and customer success. Call monitoring offers prompt alerts on coaching opportunities for agents. Customer surveys provide insights into customer satisfaction, enabling you to take corrective action based on the frequency of specific complaints. To streamline the review process, consider eliminating open-text responses. Instead, include specific questions about satisfaction with transactions conducted by your agents, with an easy, consistent scale of 1-5 stars, for example. Keep the survey

concise, with no more than five questions, and conclude with an open-ended inquiry such as "Any additional feedback?" I recommend maintaining this feedback channel for valuable insights to improve the customer experience," says Ehab Abushmais, Principal Growth Advisor at Customer Success Optimization, LLC.

Brands can distribute surveys and questionnaires through email, social media platforms, or directly on their websites to collect structured feedback. These tools can be customized with various question types, such as multiple-choice or open-ended responses, to gather specific insights. Analyzing the responses helps understand customer preferences and improve products or services. Here are a few feedback channels to consider.

Net Promoter Score (NPS) Surveys

Measuring customer loyalty and satisfaction through a single-question survey ("How likely are you to recommend our product/service to a friend or colleague?") helps brands identify promoters and detractors. This metric is a quick way to gauge overall customer sentiment and track changes over time. The follow-up questions can provide actionable insights for improving customer experience.

According to Zapier, any score above zero is good, anything above +50 is excellent, and anything over +70 is considered world-class.³

Feedback Boxes on Websites

Implementing a feedback form or suggestion box on the company website allows customers to share their thoughts and experiences easily. This method provides continuous, real-time feedback that is directly accessible, which is beneficial for identifying usability issues or new feature requests.

Social Media Listening

Monitoring brand mentions, hashtags, and direct messages on platforms like Twitter, Instagram, and Facebook enables brands to gather unsolicited feedback. This approach helps understand public perception, respond promptly to customer concerns, and engage with the community. Social media listening tools can automate the process, making tracking and analyzing mentions easier.

Customer Interviews

Conducting one-on-one customer interviews offers deep insights into their experiences, expectations, and satisfaction levels. These interviews can be conducted in person, over the phone, or via video calls and allow for detailed feedback on specific aspects of products or services. This qualitative approach can reveal nuanced customer needs and pain points.

Comment Cards

Utilizing physical or digital comment cards at points of sale, within product packaging, or on tables in a dining establishment allows customers to leave spontaneous feedback. This straightforward method immediately reacts to products, services, or customer service experiences. Analyzing these cards can highlight areas for improvement and positive aspects that customers appreciate.

User Reviews and Ratings

Encouraging customers to leave reviews and ratings on your website or third-party review sites provides valuable feedback and helps build trust with potential customers. This feedback is visible to the public and can influence purchasing decisions. It also allows brands to respond to customer feedback, demonstrating their commitment to customer satisfaction.

Live Chat and Support Tickets

Analyzing conversations from live chat and issues raised through support tickets can identify common customer issues or areas for improvement. This real-time interaction provides immediate feedback and helps resolve customer problems efficiently. Trends in these interactions can guide product updates, service improvements, and customer service training.

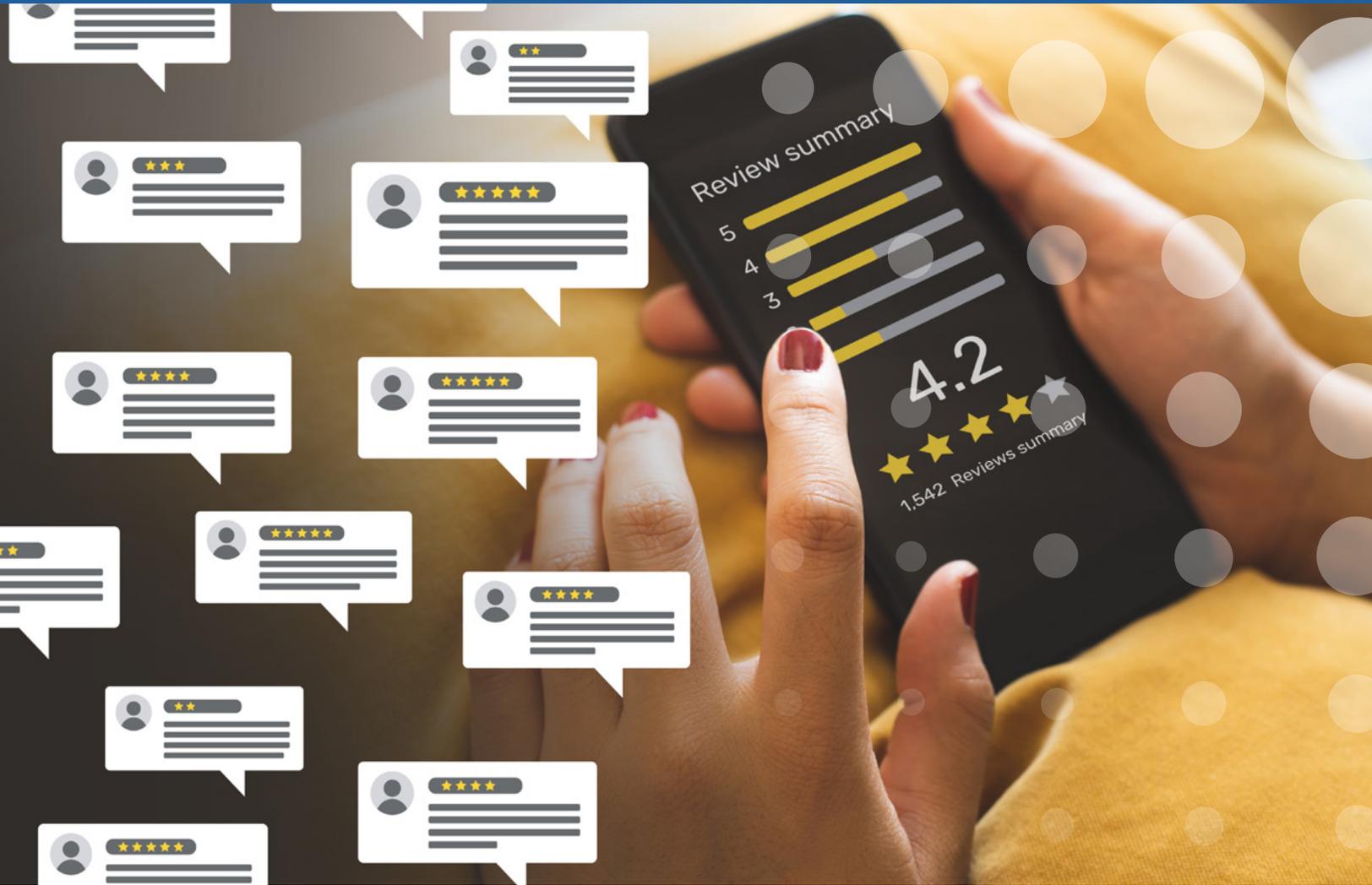
Community Forums and Discussion Boards

Creating or monitoring existing forums and discussion boards where customers discuss your products or services can offer unfiltered feedback. These platforms allow customers to share experiences, troubleshoot issues, and offer suggestions. Monitoring these discussions can help brands understand customer needs, identify common problems, and foster a community of brand advocates.

In-App Feedback Tools

Implementing feedback tools within apps, such as bug reporting, feature suggestions, or general feedback forms, allows users to report issues or suggest improvements directly. This method facilitates an accessible collection of user experiences and issues encountered during app usage. Analyzing this feedback can drive continuous improvement and enhance user satisfaction.





Analyzing and Acting on Customer Feedback

Using advanced analytics to sift through feedback helps identify common themes and areas for improvement. Acting on this feedback is crucial for fostering a culture of continuous improvement and innovation, which will lead to products and services that meet or exceed customer expectations.

“In my experience, a CSAT score (would you like to be helped by this representative again?) was the beacon to identify if there was a concern with a group or a particular representative. Suppose a group or individual score is low. In that case, that tells us that we need to get into speech analysis to see where the agent specifically could do better to address the concern and turn the experience around. The

customer may have had problems with the overall process, but an adept agent could help up the NPS and the CSAT scores. I think the surveys are a key piece of the puzzle because they can help you know where to start with your monitoring analytics,” explained Amber Fogle, former Director of Operational Training at Vroom.

Some critical steps involved in “acting” on customer feedback include:⁴

- Assigning tasks to specific groups or team members.
- Implementing automated systems to track the results of changes.
- Setting timescales and new SMART goals for customer experience.

Best Practices for Maximizing the Impact of Customer Feedback

Regular Collection and Analysis

Feedback should be collected continuously, not just at specific touchpoints or after transactions. This ongoing collection provides a more comprehensive view of the customer experience and allows for timely strategy adjustments.

Transparency and Communication

Sharing how customer feedback has influenced changes or improvements can foster a stronger connection and build trust. It shows customers that their input has a real impact, encouraging further engagement and feedback.

Empowering Employees

Employees should be trained to understand the value of customer feedback and how to collect and use it effectively. Empowering them to act on real-time feedback can dramatically enhance the customer experience.

The Role of AI in Enhancing Customer Feedback Strategies

AI has significantly transformed how brands collect, analyze, and respond to customer feedback, leading to more dynamic and personalized customer experiences. Here are some key impacts of AI on managing customer feedback for brands.

Enhanced Customer Insights

AI-powered tools can analyze vast amounts of feedback across various channels, including social media, emails, and customer reviews. This analysis helps brands gain deeper insights into customer sentiment, preferences, and behavior patterns, enabling them to make informed decisions.

Real-Time Feedback Analysis

AI enables real-time customer feedback

analysis, allowing brands to identify and address emerging issues before they escalate quickly. This prompt response can improve customer satisfaction and loyalty.

Personalized Responses

By leveraging natural language processing (NLP) and machine learning, AI can help brands generate personalized responses to customer feedback. This can make customers feel heard and valued, improving their overall experience with the brand.

Predictive Analytics

AI can predict future customer behavior based on historical feedback data. This predictive capability helps brands proactively address potential concerns and tailor their offerings to meet evolving customer needs.

Automating Routine Interactions

AI-powered chatbots and virtual assistants can handle routine customer inquiries and feedback, freeing human agents to focus on more complex issues. This can improve efficiency and reduce response times.

Improved Product and Service Development

AI-powered feedback analysis can uncover insights about product or service shortcomings and opportunities for innovation. Brands can use this information to refine their offerings and better meet customer expectations.

Scalability

AI tools can analyze customer feedback at scale, which would be impractical or impossible for human teams alone. This scalability allows brands to maintain high customer service even as they grow.

Challenges and Considerations

Despite its benefits, AI's application in managing customer feedback also presents challenges. Ensuring the accuracy of AI interpretations, protecting customer privacy, and maintaining a human touch in customer



interactions are crucial considerations for brands leveraging AI in this domain.

AI has revolutionized how brands interact with customers, offering opportunities to enhance customer satisfaction, innovate, and grow in a competitive landscape. However, AI's success in managing customer feedback depends on its thoughtful integration into a brand's overall customer service strategy, ensuring it complements rather than replaces the human element.

More Than Just Data

The strategic collection and analysis of customer feedback are imperative for businesses aiming to remain competitive in today's market. It offers invaluable insights into customer needs, expectations, and experiences, driving informed decision-making and fostering a culture of continuous improvement. By adopting best practices for collecting and leveraging feedback and embracing AI and technology, organizations can enhance customer experience, build stronger relationships, and drive brand success.

In this era of customer-centricity, feedback is more than just data; it's a brand's heartbeat, signaling its health, agility, and potential for growth. As such, organizations that listen to and act on their customers' voices will thrive in the dynamic business landscapes of the future. 🌐

Links:

1. <https://www.emarketer.com/chart/256614/Attitude-of-Consumers-Worldwide-Toward-Personalization-Customer-Experience-Provided-by-Company-2020-2022-of-respondents>
2. <https://www.forbes.com/sites/forbesbusinesscouncil/2023/06/30/the-power-of-customer-feedback/>
3. <https://zapier.com/blog/nps-net-promoter-score/>
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Human-in-the-Loop:: An Intersection of People and Technology

Businesses that balance technology's power with humans' finesse can react quickly to changing customer expectations, refine their CX initiatives, deliver on their operational plans, and stay ahead in the competitive market.

by Execs In The Know

Unprecedented efforts are underway to understand, develop, and deploy artificial intelligence (AI) to improve the customer and employee experience. With its dramatically increased adoption, customer experience (CX) leaders are banking on the rewards of enhanced interactions, increased efficiency, reduced costs, and improved experiences.

Despite rapid advances in automation, natural language processing, self-service, and other

related technology, humans still play a vital role in effective AI implementation and optimization. Many AI applications need human involvement to have maximum impact. This concept, called human-in-the-loop (HITL), is a blend of supervised machine learning and active learning where humans develop, train, test, and tune an algorithm. This practice unites human and machine intelligence to create a continuous feedback loop that allows the algorithm to produce better results each time.¹

Ways Humans Can Superpower AI

HITL practices can be used to improve the effectiveness of AI in many fields, and the increasingly widespread adoption of this technology in the CX industry offers great examples of humans and machines working in concert. Using HITL protocols can improve AI applications across the entire customer journey, but the support journey may benefit the most from this practice. Enhancing CX and ensuring the effective resolution of customer inquiries and issues is job one, and with more organizations relying on AI to augment (or even replace some portion of) live support, HITL is a best practice for leading brands.

Adding HITL elements can increase satisfaction and resolution as chatbots become more prevalent. Many organizations use chatbots to handle common customer inquiries on their websites or messaging platforms. However, when a query becomes too complex for

the chatbot to handle, the conversation can be escalated to a live customer service representative who can provide personalized assistance. Similarly, HITL can improve the critical continuous improvement process. Although automated systems can categorize and route customer complaints, human agents are often needed to investigate the root cause of the issue, coordinate with relevant departments for resolution, and follow up with the customer to ensure satisfaction.

HITL can also improve the success of contacts that start with self-service but reach a dead end. Customers often need more help answering their questions than popular self-service options like searchable frequently asked questions or knowledge bases offer. In these cases, providing the option to have a human agent deliver a satisfactory resolution is a great example of an HITL practice. The interaction

starts with a machine and, based on the reason for contact, routes to the appropriate live agent to complete the transaction. This applies to handling complex issues; some contacts may require human intervention due to their complexity or sensitivity. Human agents are best equipped to offer empathetic support and personalized solutions to resolve these types of issues.

Machine-to-human escalation can also occur in real-time. Although automated systems can do a great job of categorizing and routing customer complaints, human agents are best suited to investigating root causes, following up with the customer to ensure resolution, and identifying ways to close process or training gaps to help reduce the likelihood of the problem recurring.

Back-office systems that rely on AI can also benefit from having a human in the loop. Many quality assurance teams use AI to monitor interactions and flag those needing additional

attention. Human agents should review these interactions to ensure that the provided responses are accurate, helpful, and aligned with the organization's customer service standards. They can also identify the best next steps to address gaps and flaws when an interaction that does not meet the standard occurs.

Sharing feedback is a popular trend among customers and can generate mounds of data, which AI can efficiently collect and analyze across various channels, including transcripts, surveys, social media, and other online feedback/comment channels. Once the data is mined and analyzed, humans can review the trends and create actionable responses to address concerns and improve process gaps. Humans can also easily see where they need to step in and directly respond to a customer to resolve an issue and recover from a problem. The support AI provides to this work increases employee productivity and operational efficiency.



Benefits to the Customer Experience

Although many customers may be satisfied with AI interactions, depending on preference, need, and contact type, keeping humans in the loop can benefit their experiences. In addition to escalation and complex issue resolution HITL practices help keep the human touch and the customer at the forefront. Customers often enjoy a more empathetic, engaging, and memorable experience when the human touch guides the interaction.

Research shows that “emotional motivators are a better gauge of customers’ future value to a firm than any other metric, including brand awareness and customer satisfaction, and can be an important new source of growth and profitability.”² Providing empathy and understanding to frustrated or upset customers is critical to a positive outcome of the contact – soft skills a human can deliver effectively.

Most customers expect to have a relationship with brands they choose to do business with; the service experience is a critical phase of that relationship. As brands look for ways to deepen their relationship with their customers, HITL practices can greatly benefit. Machine interactions can help deliver fast and cost-effective customer service for certain contacts, but companies must be sure they offer the best channel to improve customer connection. fully connected customers are 52% more

valuable, on average than those who are just highly satisfied.³ And great human-to-human interactions help deliver that important connection!

Keeping a human in the loop also enables personalization, increasing the connection and strengthening the customer-to-brand relationship. Human intervention in automated processes can lead to more personalized and tailored interactions; human agents can better understand and respond to individual customer needs than automated systems alone. Customers will benefit from more personal experiences that are targeted to their specific needs and circumstances.

Another customer benefit of keeping humans in the loop is the experience's adaptability. Interactions with human agents are more adaptable to changing customer needs and situations, providing them with more flexible solutions than machine-only options. Although AI-powered experiences are advancing and becoming more dynamic, customers can still benefit from human-to-human interactions that deliver creative and unique solutions to meet changing needs. Human agents are better equipped to handle nuanced contacts that adapt to customer scenarios that evolve before and/or during the interaction.





Improvements in the Employee Experience

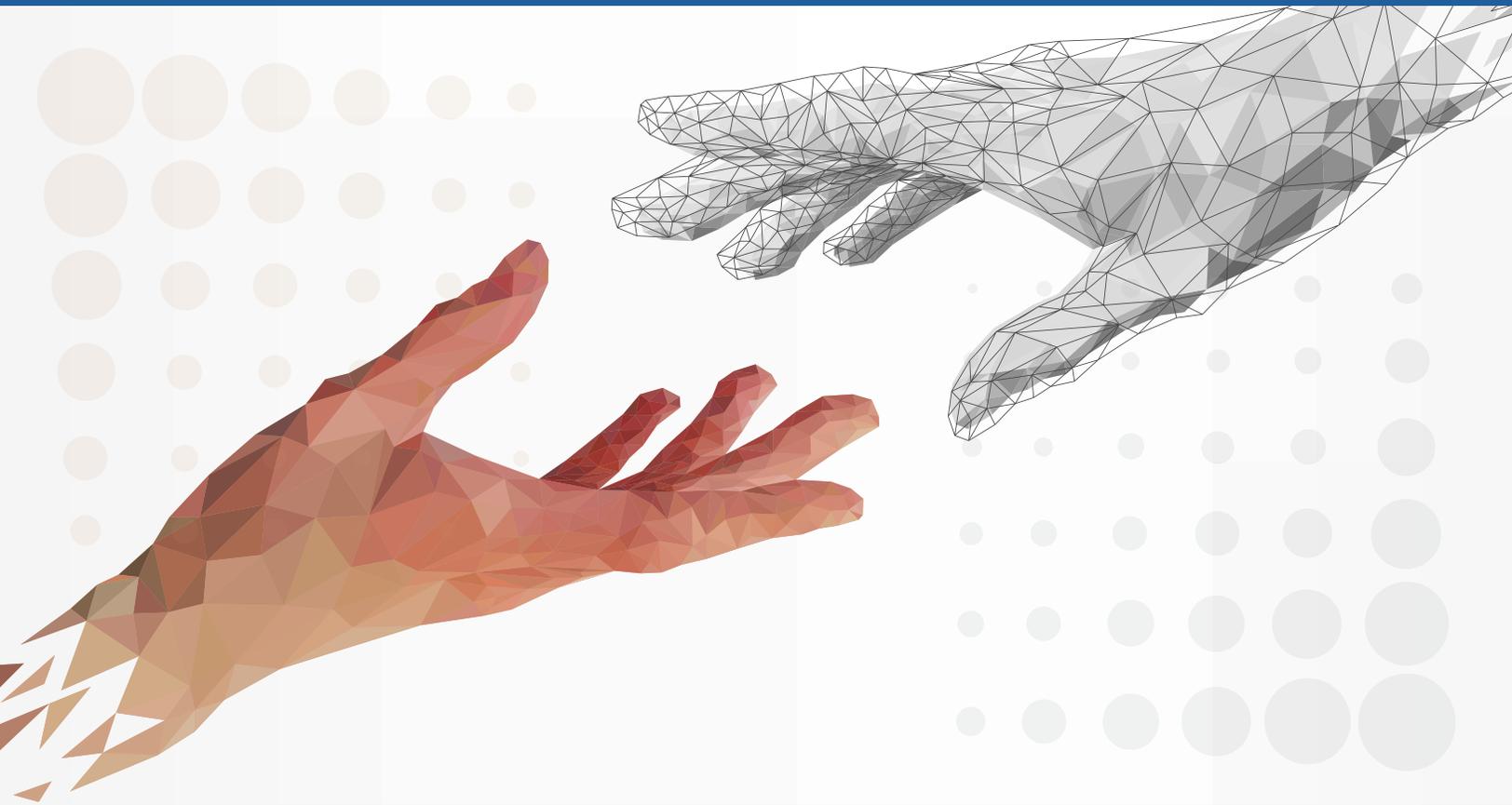
While keeping the HITL approach benefits customers by adding a human touch to interactions, providing empathy and understanding, and allowing adaptation to accommodate changing needs, employees can also reap benefits from this practice. First and foremost, HITL processes provide job security in an innovative and dynamic work environment. Automation often leads to concerns about job displacement, but HITL requires human judgment and expertise to be part of the system. Employees will understand that by design, they remain an essential part of the automated systems being used in the organization; they will see that AI is an enhancement to the business, not a replacement for them. This security will help increase their satisfaction and retention. With AI systems as a partner, employee performance likely will improve as well.

Similarly, employee engagement is another benefit of keeping humans involved in automation. Employee involvement in HITL processes can increase engagement as they see the direct impact of their contributions on system performance and outcomes. For example, offering employees a way to tune

AI tools (such as a thumbs up/thumbs down feature) is a powerful way to involve them in improving system performance. Being involved in decision-making processes and having the ability to influence the success of automated systems can also empower employees and help them feel more valuable to the organization.

HITL should improve employees' overall work environment by combining customer-facing benefits. Employees are likelier to feel engaged and satisfied when they have meaningful opportunities to contribute to the organization and the experiences they deliver. They can see the results of HITL in their own experiences and those that positively impact the customer experience.

Finally, employees participating in HITL tasks have the opportunity to develop new skills in data annotation, quality control, prompt engineering, change management, and AI development, to name a few. Since HITL often involves a mix of automated and human tasks, employees are offered a variety of dynamic experiences without monotony. This creates a diverse and dynamic environment in a positive way, enhancing employees' professional growth and job satisfaction.



Considerations for Uniting Human and Machine

The deployment of AI and automated systems in contact centers is at an all-time high and is still growing. “These days, it’s almost an anomaly when a major brand or business doesn’t have chatbots on its website – which speaks to their success, at least anecdotally.”⁴ BUT the real power is in the unification of humans and machines. Keeping humans in the loop has major benefits for both customers and employees. In addition, ensuring that HILT practices are in place is important to automated systems' effectiveness, fairness, and reliability.

CX leaders are working to strike a balance between cost-effective automation and

live service that delivers empathetic and personalized experiences to strengthen the relationship between brands and customers. Arguably, nothing builds connection like human interaction, while AI enables teams to harness data to reveal valuable insights; together, the human and machine teams can ensure continuous improvement, operational efficiency, and enhanced experiences. Businesses that balance the power of technology with the finesse of humans can react quickly to changing customer expectations, refine their CX initiatives, deliver on their operational plans, and stay ahead in the competitive market. 🤝

Links:

1. <https://www.telusinternational.com/glossary/human-in-the-loop>
2. <https://hbr.org/2015/11/the-new-science-of-customer-emotions>
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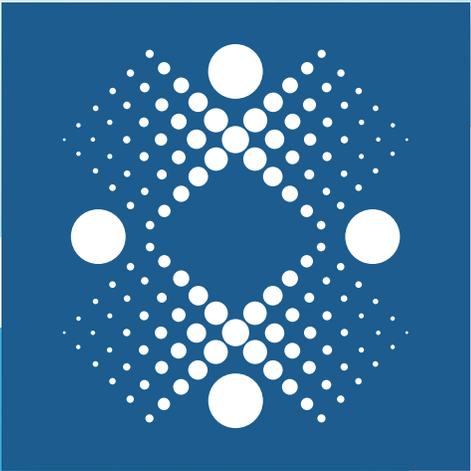


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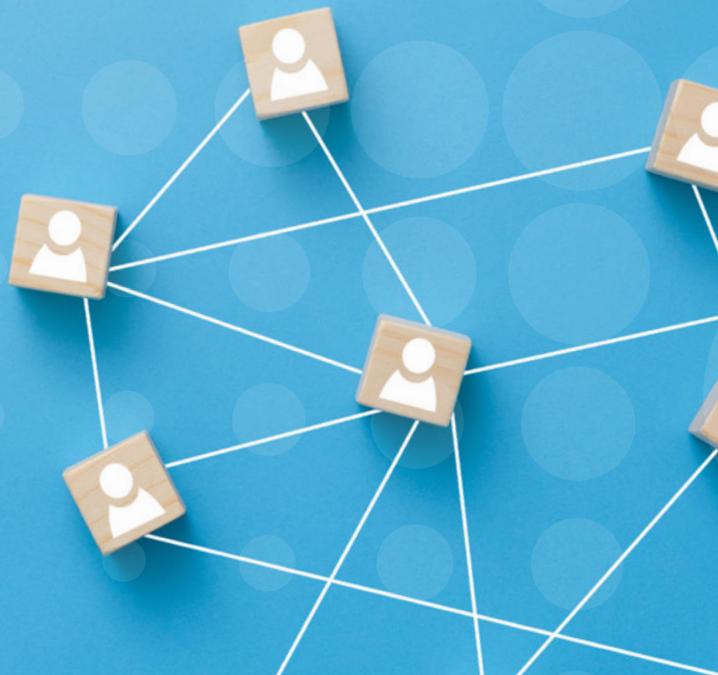
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The Evolving Landscape of BPO Contracts

Explore how BPO contracts are adapting to change and evolving with the dynamic needs of businesses.

by Execs In The Know

In today's rapidly evolving digital landscape, the dynamics of Business Process Outsourcing (BPO) contracts are undergoing a significant transformation. As companies strive for agility, efficiency, and innovation in serving their customers, traditional BPO models are being reimaged.

The quest for competitive advantage has shifted the focus from mere cost-cutting to forging value-driven, strategic partnerships. This shift is not just about adapting to new

technologies; it's about embracing a new ethos in customer experience leadership.

Gone are the days when outsourcing contracts were merely transactional agreements to reduce overheads. [A recent report by McKinsey¹](#) underscores this shift, noting that digital services' share of total contract value in the BPO sector surged from 30% to 70% between 2016 and 2020. The digital revolution has ushered in a new era of BPO contracts, characterized by their dynamic nature and focus on delivering tangible business outcomes.

From Cost-Savings to Strategic Value

In our February 2024 report, [Exploring Corporate Opinions on BPOs in partnership with NICE²](#), reducing costs was the most common response (33%) by survey respondents when identifying outsourcing objectives. For those not currently outsourcing, reducing costs would be the primary driver should they choose to outsource in the future.

In this digital age, BPO contracts are increasingly centered around value creation. This means achieving cost efficiencies, driving business growth, enhancing customer experiences, and fostering innovation. The emphasis has moved toward outcome-based contracts, where the success of the outsourcing partnership is measured by its ability to deliver specific, measurable business results.

This approach aligns the service provider's objectives with the client's strategic goals, fostering a more collaborative partnership.



Embracing Flexibility to Meet Dynamic Business Needs

As customer expectations continue to evolve at a breakneck pace, businesses must remain nimble. Modern BPO contracts reflect this need for flexibility, incorporating provisions that allow for the rapid scaling of services, adjustments to scope, and the adoption of new technologies.

This agility is crucial for companies looking to maintain a competitive edge in a market where customer preferences can shift overnight.

From a macro perspective, some [CX leaders defined flexibility as the ability of their BPO partners to adapt to a new way of doing business based on their client's needs³](#). This could mean investing in new technology, adjusting contract structures, or finding innovative ways to contain costs. Regardless of how CX leaders defined flexibility, there was near-universal consensus on the importance of BPOs/outsourcers being flexible.

Here are some of the responses we received from corporate CX leaders when asked, "If you were looking for flexibility from a BPO/outsourcer, how would you define flexibility?"

- "The ability for my partner to scale up or down as my business needs dictate."
- "Willingness to adopt my philosophies and way of doing business, embracing them as their own."
- "I define flexibility as being able to adapt to seasonal volume flow and fluctuation while working within a 90-day forecast model."
- "Having the IT infrastructure, HR, and training to shift program/project focus without sacrificing CX and transparency."



Technological Integration: A Key Driver of Transformation

Today's BPO contracts often extend beyond service delivery to include innovation and continuous improvement provisions. Service providers are expected to bring fresh ideas and technologies to the table, helping clients stay ahead of the curve. This collaborative approach to innovation is pivotal in creating value and enhancing the customer experience.

Integrating advanced technologies like AI, machine learning, and automation into outsourcing services has been a game-changer. These technologies enhance efficiency, reduce errors, and enable the delivery of personalized customer experiences at scale. But beyond operational benefits, they also offer strategic advantages.

By leveraging data analytics and AI, companies can gain deeper insights into customer behavior, refine their service offerings, and anticipate market trends. The importance of data in informed decision-making has led to a rise in outsourcing data analytics. Companies leverage external expertise to extract meaningful insights from data, facilitating better customer experiences and optimizing operational processes.

Integration of AI and Automation: Outsourcing providers increasingly incorporate AI-driven solutions, such as chatbots for customer service, robotic process automation (RPA) for data entry, and machine learning for data analysis. These technologies enhance efficiency, reduce operational costs, and improve accuracy, but they also raise concerns about employment and necessitate strategies for retraining and managing socio-economic shifts.

Data Security and Compliance: Non-Negotiable Pillars

In a world increasingly concerned with data privacy and security, BPO contracts now prioritize these aspects. Ensuring robust data protection measures and compliance with global regulations such as GDPR and HIPAA has become a cornerstone of modern outsourcing agreements. This focus on security and compliance mitigates risks and builds customer trust, a critical factor in the customer experience equation.

When surveyed, 35% of CX leaders ranked data integrity and security as a top outsourcing concern.⁴

Outcome-Based Contracts

There's a notable shift from traditional contracts focused on hours worked or resources allocated toward outcome-based contracts. These contracts focus on achieving measurable results, such as increased revenue, reduced costs, or improved customer satisfaction. This shift encourages a more results-oriented approach and aligns the interests of clients and outsourcing providers more closely.

CX leaders not only prefer clear targets and expectations but a deep understanding of why these measures matter⁵, both operationally and

strategically. Monitoring must be robust and should lead to actions that positively impact the numbers and the experience from the end user's perspective.

Bilateral Service Agreements

Compensation and contract terms should be fair and equitable, not onerous and one-sided. Bilateral service agreements are increasingly becoming pivotal for organizations seeking operational efficiency and cost-effectiveness. These contracts, marked by mutual agreements between two parties, offer a bespoke approach to outsourcing, enabling businesses to tailor services according to their specific needs. This customization enhances the alignment of business goals between the outsourcing company and the service provider and fosters a more collaborative and strategic partnership.

A significant trend observed in bilateral service agreements is the emphasis on incorporating digital transformation and advanced technologies such as AI and machine learning to streamline processes and improve service delivery. Furthermore, these agreements often include provisions for risk-sharing and performance-based metrics, ensuring that service providers are incentivized to achieve and maintain high service standards.





As businesses continue to navigate the complexities of the global market, the flexibility, efficiency, and innovation offered by bilateral service agreements in the BPO sector are proving to be invaluable assets.

Sustainability and Responsibility

Lastly, there's a growing emphasis on sustainability and corporate social responsibility (CSR) in outsourcing decisions, with companies seeking partners that align with their sustainability goals. These trends reflect a shift towards more strategic, technologically advanced, and socially responsible outsourcing practices.

They underline the industry's move away from cost considerations alone and toward innovation, customer experience, and sustainability. Companies engaging in BPO should consider these evolving dynamics to remain competitive and effectively address their specific business needs.

Navigating the Future

As we navigate this new landscape of BPO contracts, brands are focusing on creating strategic partnerships that drive value, agility, and innovation. The future of outsourcing

is not just about delegating tasks but about co-creating solutions that propel businesses forward in the digital age.

The journey through the evolving landscape of BPO contracts require strategic foresight. As we look ahead, the fusion of technology, strategic partnership, and dynamic contracting models will continue to shape the future of outsourcing, heralding a new era of opportunities and challenges in the quest for exceptional customer experiences. 

Links:

1. <https://www.mckinsey.com/capabilities/operations/our-insights/getting-business-process-outsourcing-right-in-a-digital-future>
2. <https://execsintheknow.com/exploring-corporate-opinions-on-bpos/>
3. <https://execsintheknow.com/exploring-corporate-opinions-on-bpos/>
4. <https://execsintheknow.com/exploring-corporate-opinions-on-bpos/>
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Execs In The Know

Grow Your CX IQ

Execs In The Know's extensive customer experience (CX) research library is the industry's go-to source for insider insights, consumer perspectives, and timely, trending data touching on all aspects of customer care. Tap in and find inspiration for your next big program-defining idea.



"Only 31% of CX leaders are 'Very Satisfied' or 'Satisfied' with the CX technology stack."

– CX Leaders Trends & Insights Corporate Edition, March 2023



"Seventy-three percent of organizations are currently investing in AI for their CX operations, up from 48% year-over-year."

– CX Leaders Trends & Insights Corporate Edition, March 2024



"Sixty-nine percent of Retail/eCommerce brands have seen improvement in their critical program KPIs over the past 12 months."

– Experience & Loyalty Insights, August 2023



"Thirty-three percent of survey respondents have been asked for price increases by their BPOs in the past 12 months."

– CX Outsourcing Insights, June 2023

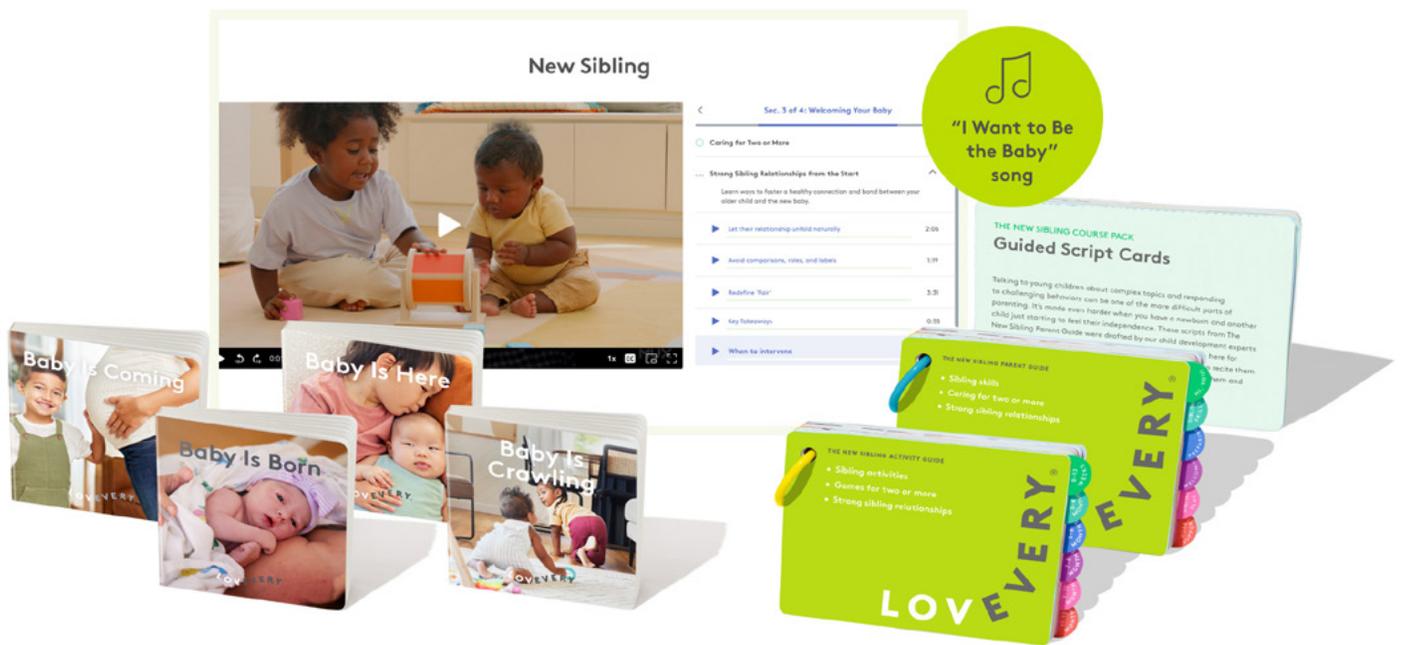
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BRAND SPOTLIGHT

Lovevery

Every Interaction Is an Opportunity to Build Better Relationships with Customers



Emily Sarver is the Vice President, Customer Experience for Lovevery, a subscription-based early learning company with a focus on early childhood development. Now in its eighth year, Lovevery has more than 350,000 active subscribers and is one of Fast Company's Most Innovative Companies. Emily has over 10 years of experience in CX leadership, specifically in startups and direct-to-consumer spaces, and has a passion for building and scaling world-class support teams.

Execs In The Know (EITK): Emily, you've been instrumental in Lovevery's evolution of customer experience. Could you share with us the foundational principles that have guided you in crafting Lovevery's unique customer experience strategy?

Emily Sarver: First, every interaction is an opportunity to build a better relationship. We have a 'people-first' mentality as a core value of our customer experience. First off, that means



LOVEVERY®

EMILY SARVER

Vice President,
Customer Experience



that we take good care of our support team – we recruit and retain the best of the best, and we nurture a strong internal community. Our program is subscription-based, so retention is a key factor for success. Our team does as much as they can to drive loyalty and retention through relationship-building with Lovevery subscribers.

Out of those relationships, continue seeking out moments to learn. These moments happen frequently, and in big and small ways, but they also require a leader to commit time, space, and energy. Data can (and should!) tell you a lot, and building a clean dataset is essential for a thriving CX organization. But without digging into the stories behind that data, you might miss some of those pivotal, ‘a-ha’ moments.

EITK: Lovevery places a strong emphasis on agent education and empowerment. How does the brand ensure that agents are fully equipped to provide the level of service expected by customers?

Emily: First of all, we recruit top talent. We look for people who are willing to learn, problem-

solve, and innovate. From there, we’ve invested in thorough onboarding, continuing education, and effective resource building, to make sure that our team truly feels empowered to do their best work. Our quality assurance program was also constructed to help coach and train our team members in the areas of brand voice and tone, consistent processes, and resolution. When it comes to constructing the associate experience, we’re in a cyclical process of learn-build-iterate-learn.

EITK: Lovevery’s commitment to sustainability and ethical manufacturing is notable. How does this commitment translate into the customer experience, and how do you communicate these values to your customers?

Emily: As part of our core mission, Lovevery is focused on offsetting environmental impact to improve climate outcomes for future generations. All of our products ship carbon neutral with efficient packaging to reduce waste. Our products are crafted from materials like FSC sustainably harvested wood, organic cotton, OEKO-TEX® fabrics, handcrafted felt from a supplier committed to fair trade, recycled paper, soy-based ink, and water-based paints. Even certain products—like our Super Sustainable Sink and Turtle Hatch Game—contain bio-based plastic. Biobased plastic is sourced from sugarcane rather than petroleum, which significantly reduces these products’ carbon footprints.

We design our products to be timeless, built to last, and so they will grow with your child. If a part does go missing, our lost parts program will work to make playthings whole again. To date, our lost parts program has fulfilled over 44,000 part requests to save incomplete products from going to the landfill.

This is a core part of who we are as a brand and the work we do to create brighter futures for children. We highlight this information for the families that we serve across our website, packaging materials and other customer touchpoints.

EITK: Can you tell us more about how the subscription model at Lovevery caters to the evolving needs of growing children and their parents and how you maintain personalization at scale?

Emily: It's been a privilege to be a part of the evolution of our product offerings for families, specifically with our Play Kits subscription. Each Play Kit hones in on specific developmental milestones, so every piece has a purpose and many ways to play. But we also know that each child develops at their own unique pace, and with their own interests, and our CX team is always happy to help adjust schedules so that Play Kits arrive on specialized timelines, or skip a Play Kit if it seems like it's not a good fit.

Along with this, The Lovevery App offers personalized, day-to-day guidance for parents and caregivers, with new ideas for playtime and expert guidance about specific developmental topics. We've truly created a holistic support system to bring more connection and purpose to families as their little ones grow.

EITK: The pandemic brought about a hypergrowth phase for Lovevery. How did the customer experience team adapt to the surging demand while maintaining quality support, and how has this level of support continued?

Emily: Even as so many families were isolated at home, Lovevery became the answer for how to facilitate meaningful, screen-free play. As a result, our customer base skyrocketed, as did the demand for customer support. We had to become the most nimble versions of ourselves in almost every way: we recruited more quickly, we prioritized onboarding efforts, and we did many 'on-the-spot', ad-hoc trainings to keep team members constantly acquiring new knowledge and skills. Out of this, we've now taken huge strides to refine all of the tools, resources, and empowerment that our team needs to do its best work—for example, a robust and navigable knowledge base.

EITK: What role has technology, particularly artificial intelligence/automation, played in managing and enhancing the customer experience?

Emily: We've looked at AI and automation in an internal capacity first, focusing on where and how it can help our team become more efficient or effective. One of the specific platforms we've incorporated (FlowEQ) lets us build out guided and automated workflows that sit directly inside our helpdesk. We've also leveraged AI to detect customer sentiment and intent, which has resulted in better handling and more accurate analysis of customer insights.



EITK: Could you discuss Lovevery's measures to build and maintain high customer satisfaction and loyalty, especially through personalized service?

Emily: We want to support customers throughout their entire Lovevery journey. As part of this, we employ an omnichannel support strategy to keep customer touch points all in one place, so that associates can understand the touch points within that journey. Also, maintaining high service levels across channels, as well as consistent attention to detail (which we specifically coach through QA), ensures that we are able to focus on each interaction and tailor it to the customer.



EITK: How does the brand maintain a cohesive team culture and high levels of employee engagement?

EMILY: There's been a lot of intentionality in creating the culture of our CX team, starting with a clear vision for what defines us. We're a team of learners, a team that thrives on collaboration and problem-solving, and a team with exceptional written communication skills. That foundation sets the tone for everything else that follows, from what kind of questions we use during recruitment, to what we emphasize during team huddles, to how we've constructed our QA program. Genuine connection is key!

EITK: Looking ahead, what innovations or improvements can customers expect to see in Lovevery's customer experience, particularly in the digital space?

Emily: We've just gone live with offering SMS as a support channel for Lovevery customers, which is an exciting new endeavor for us. We're also currently exploring the powerful capabilities of AI, and how we might best leverage it. It takes careful consideration of 'the right time and the right place' for knowing how to utilize AI at the moments that really matter, both for our support team and for customers. We want to continue building an experience that nurtures loyalty for Lovevery customers, and we're excited to see what's next. 🌟



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 Emily Sarver and the entire team at Lovevery 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.

What is Reflected Intelligence?

by Chance Whittle, Principal AI Consultant, PTP

Gen AI and the Subjective Customer Experience

In the rapidly evolving digital landscape, the power of Generative Artificial Intelligence (AI) is undeniable, yet its potential is often undermined by a critical oversight: the neglect of the customers' subjective experience. Enterprises deploying one-size-fits-all solutions fail to engage customers effectively, overlooking the nuances of human communication and their own brand identity. This not only diminishes the customer experience but also hampers the success of an Enterprise's Generative AI initiatives. Without incorporating Reflected Intelligence (RI), these systems overlook enterprise-specific knowledge, processes, and branding, which are crucial for meaningful AI interactions.

Enhancing Gen AI with Reflected Intelligence

Reflected Intelligence (RI) bridges this gap, ensuring that Enterprise Generative AI fulfills its promise of transforming business operations. RI goes beyond technical proficiency by mirroring an organization's human intelligence and capturing employee knowledge, communication styles, and company culture. By understanding the customer and enterprise context, RI customizes responses, fosters trust, and drives adoption. This article explores the core principles, benefits, and implementation strategies of RI, paving the way for a new era of customer service-centric AI experiences.

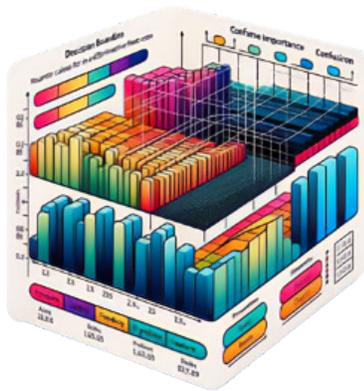


The Problem with AI

Experience experts have emphasized the technological potential of personalization and efficiency through Generative AI, overlooking the critical aspect of how customers perceive their interactions with AI systems subjectively. This standardized approach, where AI interactions remain inherently neutral and objective despite being augmented with human-like conversational elements and response indicators, results in experiences that can feel unengaging and detached from the brand identity customers have come to expect. Such generic interactions, rooted in limited data sets and an absence of contextual understanding, fail to capture the subtleties of human communication and knowledge, thereby impeding user adoption and satisfaction.

There are two basic types of AI models:

1. Discriminative AI models are designed to classify and categorize data based on their training data sets. These models are often used for predicting the next word in a sentence, classifying information, and following predetermined steps. The output of discriminative AI models is selected from the existing options provided in workflows or datasets. These models are commonly used for tasks such as routing calls, sentiment analysis, chatbot interactions, IVR NLU, and spam filtering.



2. Generative AI models can combine reasoning with content creation (text, voice,

or images) to convey accurate understanding and results to the end user. These modules are commonly used for various applications, such as IVR Natural Language Understanding (NLU), Generative Agents or Assistants for Voice and Chat, and Generative Analysts for Voice, Text, and Data.

The Solution

RI addresses this gap and is a transformative solution enabling AI to mirror an organization's employee knowledge, communication style, and culture. RI aims to elevate the customer's experience, fostering a more personalized and engaging interaction that resonates with the enterprise's identity and values. This integration challenges the prevailing norms of AI interactions and signifies a pivotal shift toward creating enterprise-acceptable AI solutions.

RI Core Principles

At its core, RI allows AI to capture, understand, reflect, and mirror an enterprise's peer-to-peer (employee) knowledge, existing business processes, common communication styles, and the enterprise's culture. The result is to improve the customer's experience when interacting with the AI, leading to increased adoption.

- **Employee Knowledge:** RI captures the collective knowledge and expertise shared between employees during interactions. These are often situations and/or information not collected or captured properly within Knowledge Management databases. This type of intel may also discover employee practices still in use that are different from the preferred method of resolution.
- **Business Processes:** RI also expands the Generative AI's Reasoning and Acting (ReAct) approach to better understand all the business processes and workflows

in place, allowing the Generative AI to predict the following best action(s) within the desired process(es). This reflects how tasks are typically completed within the organization.

ReAct:
Gen AI combines **Reason with Action (ReAct)** by working with adjacent systems to predict the actions to be taken and then takes the actions. It **eliminates** the deterministic method of “**If**” and “**Then**” commands used by RPAs, Chat Bots, and IVR Flows today.

- **Communication Styles:** RI can also understand how employees communicate with each other and with customers, which is essential to maintaining the brand image and keeping people engaged in the interaction.
- **Company Culture:** Absorbing the overall corporate values, attitudes, and behaviors that define the company's work environment is another benefit of AI. It enables an understanding of the organization's decision-making process and further fine-tunes a Generative AI's ReAct approach.

RI Benefits



The concept of RI underscores the importance of automation being technically proficient but also being deeply integrated with and reflective of the organization's specific context and nuances. It enables a more natural and helpful AI experience that will boost trust and adoption, leading to improved efficiency and return on investment. Some of the key benefits include:

- **Increased Knowledge:** Bridge information gaps between departments by capturing and sharing tacit knowledge exchanged between employees.
- **Context-Aware Responses:** Consider the user's role, department, and current task when providing information or completing requests, leading to more relevant and helpful responses.
- **Increased Adoption:** The adoption of RI models leads to AI interactions that are more relevant and engaging for both employees and customers.
- **More Natural Interactions:** By understanding communication styles and company culture, RI can tailor its responses to feel familiar and natural to customers, leading to smoother and more engaging interactions.
- **Enhanced Brand Identity:** RI ensures that AI interactions resonate with the brand identity and values, creating a more cohesive and satisfying customer experience.
- **Increased Trust:** Customers are likelier to trust an AI that reflects their company's values, understands their work and communication environment, and provides accurate information.

RI Challenges

It is important to acknowledge that any innovative technology comes with unique challenges that need to be considered beyond the typical concerns of privacy, confidentiality, risk, and compliance. However, a proactive and thoughtful approach can effectively address and manage these challenges.

- **Passive knowledge:** Captured from real-world interactions can sometimes lead to inaccurate or biased information. This, in turn, may require data cleaning and filtering techniques to be applied, which are typically



carried out by technical specialists who are knowledgeable about the relevant tools and techniques. By using these techniques, it is possible to mitigate the impact of any unwanted biases or inaccuracies that may have been introduced during the knowledge capture process.

- **Scalability and Adaptability:** Scaling RI to handle large organizations with diverse departments and workflows can be complex. Additionally, adapting RI to evolving company cultures and communication styles requires ongoing maintenance and adjustments.
- **Technical Implementation:** Extracting meaningful insights from unstructured data (like conversations) requires technical specialists who can navigate the complexities of Generative AI models, reasoning systems, and unstructured data processing.

Implementation and Controls

To successfully implement an RI model, it is crucial to establish a strong partnership between business leaders and technical experts. They need to work together with confidence to define an overall strategy and roadmap that encompasses the right combination of innovative Generative AI tools and techniques and a robust architecture for data acquisition, processing, knowledge representation, reasoning, and multiple levels of safeguards and controls.

- Incorporate an “adversarial” Generative AI in real-time to fact-check the generative outputs before they are presented during an interaction. This adversarial Generative AI would act as a discerning reviewer or “Critic Agent,” identifying any potential biases, inaccuracies, or hallucinations produced, thus enhancing the overall accuracy and reliability of the system.
- To prevent biases and errors with RI, a human-in-the-loop (HITL) approach can be used. This involves presenting the captured data to human experts for validation before the Generative AI uses it. Human reviewers can check the data's accuracy, completeness, and potential biases and make necessary corrections to increase the level of confidence.

Human-in-the-loop is when humans help AI systems make decisions or learn by providing feedback or corrections. This approach is used to improve the accuracy and effectiveness of AI, especially in important or complex situation.

Leverage Explainable Artificial Intelligence Techniques

- *Feature Attribution* to explain how individual pieces of data contribute to the AI's final output.
- *Model Visualization*, which can help people understand the inner workings of the AI model, would outline the high-level steps for the critical decision elements.
- *Counterfactual Reasoning* allows people in the HITL feedback process to explore how the output would change if certain input features were modified.

Summing It Up

An RI model integrates seamlessly with business processes, reflecting an enterprise's workflow, decision-making, and operational strategies. This allows it to begin absorbing and adapting to the enterprise's culture and considering the prevalent value norms and behaviors. It also ensures that the interactions and outputs are relevant and appropriate.

- Generative AI's focus on technological capabilities often misses the critical aspect of customer subjective perception, leading to interactions that fail to use enterprise knowledge, lack branding, and do not help customers.
- Standard AI approaches result in generic interactions that lack contextual understanding and do not capture the nuances of human communication.
- RI challenges the prevailing norms of AI interactions by integrating deeply with an organization's unique identity and values. It aims to create AI solutions that are technically proficient but also meaningful and customer accepted.

- The adoption of RI models, designed to reflect and adapt to an enterprise's culture and workflows, significantly improves customer experience. It also increases adoption by making AI interactions more relevant and engaging.

Current AI prioritizes technology but neglects customer experience and enterprise knowledge. Reimagine AI interactions with Reflected Intelligence. RI infuses AI with your organization's DNA, fostering natural, engaging experiences that resonate with your brand. By understanding your company culture and communication style, RI builds trust and drives user adoption. Unleash the true potential of AI with Reflected Intelligence.

About the Author

Chance Whittley

Principal AI Consultant, PTP



Chance has more than 25 years of experience working in the field of contact centers. My goal is to help my clients surpass their customers' expectations and improve their operational benchmarks. By utilizing advanced technology, I focus on improving the customer experience and operational efficiency. This transforms the contact center ecosystem and makes it ready for the future.



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AMBER FOGEL
Formerly Vroom Automotive

Amber is an innovative collaborator and creator with experience building teams, forming and scaling learning and development and customer success programs from the ground up and driving operational excellence through targeted training, learning, and development. With almost 20 years of experience, her career has spanned various sectors, including travel, retail, and automotive. Most recently, she served in a dual

capacity as a team leader of operational training and project lead for HR alignment and mentorship initiatives at Vroom Automotive.

Execs In The Know (EITK): What are the key drivers of delivering exceptional customer experience, from your perspective?

Amber Fogel: I think there are two things:

#1: Know your customer. Put succinctly: have the right data in the right place at the right time. The more insight you can glean from your customers' activity with your product or service, the better you can anticipate their needs and create experiences that give them what they want before they ask for it. The more effort a customer must put into engaging with you, the less likely they will be loyal in the long run.

#2: Mobilize your teams with the right information and a service mindset. Service teams must have easy access to customer data to see customers' full profiles and experiences

with your business, highlight wins, and anticipate pain points. Access to knowledge tools and the decision-making authority to remove pain points is also key for service teams. Combining these tools with a value-driven, customer-focused approach is a winning combination for exceptional service.

EITK: Can you share an example of when you had to innovate to solve a leadership challenge, particularly in building or training a team?

Amber: My most recent and biggest challenge as a leader was restructuring my team after layoffs. From my experience, you are often left with fewer people to do the same amount of work. I come from an operations background, and I learned early on that to weather interruptions like this, you must have strong

project management, backup team members for all key functions your team handles, and current, documented standard operating procedures for key tasks and projects.

- I recommend using a project management tool shared by the team that tracks who is assigned what and all the notes/ documentation and info for a task in one place. (Asana is my go-to tool). This will allow you to easily reassign work to your current team members and provide the context they need to get aligned and move on it quickly.
- I ensure that there is a primary owner for tasks and a backup so that if the primary owner is out or released, the backup can take over.
- For any key function or project that my team manages, I ask that the primary owner create an SOP document, job aid, or manual outlining how the work is done. This ensures that we have a resource to train others or explain our process to stakeholders.

Once you take a look at what work is still assigned and to whom, you can re-prioritize and set expectations with your stakeholders.

EITK: Drawing from your experience, how do you align team training and development programs with the evolving voice of the

customer? Can you share a specific instance where this alignment significantly improved customer satisfaction or business outcomes?

Amber: I like to think of the VOC, QA, and Training areas as a cyclical system. The VOC feedback tells you what your customers need from you and what they expect. Your QA standards are then built off that feedback (and also off operational requirements). The training programs then set the agents up for success by showing them the QA standards they will be held to and how to meet them. If VOC data is continuously analyzed by both the quality and training teams, it gets incorporated into the standards and training continuously. This way all of these areas are constantly in sync.

Early in my tenure at Vroom, our Knowledge Base was in its infancy with a short list of responses and some redundancies. We recognized from our audits and VOC feedback that different agents were giving very different answers to the same questions, or they couldn't find the answers at all. The training and QA teams held focus groups with agents and the QA auditors to find out the most frequently asked questions and worked with SMEs to validate the correct answers. We implemented a centralized, consolidated, and formalized Knowledge Base within the CRM and held training sessions to re-introduce agents to the



tool and its benefits. The primary quantitative outcome was a 40% reduction in handle time over two months. Qualitatively, the agents and auditors were grateful for a more useful and consistent tool.

EITK: How do you prioritize and tackle performance gaps within teams or processes, especially in fast-paced environments like those you've worked in across travel, retail, and automotive sectors?

Amber: Classic needs assessment from the ADDIE model of curriculum development! The A is Analysis, and the key question is: What is causing the gap? Is it will, skill, or knowledge? If it's a will, that's not a training issue; it's a culture issue that needs to be surfaced to leadership so change management processes can be implemented to alter the perception of the work. If it's skill or knowledge, training/learning can help to bridge the gap. A caveat here is tools – if the tools are poor or outdated, that can create a performance gap of a different kind, but it can show up as lack of "will" because agents don't want to use it. Prioritization usually comes down to the performance gap's overall impact to the business and how fixing it will get us closer to achieving strategic goals.

EITK: With your experience in scaling learning and development (L&D) and customer success programs, what key factors do you consider when identifying areas for operational improvement and efficiency?

Amber: Study your KPIs. It would be a huge miss to iStudy your KPIs. It would be a huge miss to identify a metric as important, rearrange tools and resources around it, and then determine that metric isn't that critical after all. Know what you're measuring and then identify what success looks like for that metric. If a number isn't where you want it to be, that's where you should put your attention.

From there, a needs assessment is a useful tactic. Again, is it will, skill, knowledge, or tools that negatively impact the process? The answer to that can help you determine what



kind of change management approach to apply overall, what training may be required, and what tools and resources need to be re-evaluated.

EITK: As someone passionate about positive transformation and mentorship, how do you approach mentoring emerging leaders? Can you share a success story?

Amber: When mentoring others, I try to ask the right questions to determine how the mentee wants to grow or improve. I encourage them to verbalize it so they can "own it." We will also try to define what success looks like to them, so we know what we are aiming for. Then we work together to explore ways they can practice that skill or attribute. Usually, there is a current project they can apply this to, but if not, we will find a way to practice it as a pair – I'll give an assignment or lead a role play. As the mentorship progresses, I'll do check-ins with specific questions to gauge how they are feeling about the direction they are going.

I've found that project management is not widely taught to younger workers, but I feel like it's a critical skill for anyone to have. For those



on my team who didn't have this experience, I would require that they demonstrate specific project management steps as part of their tasks. They had a lot of freedom to run their project their way, but I wanted to instill the fundamental steps as their foundation. This proved to be extremely beneficial for them and our team, and we became reputable for our transparency, planning, and execution of projects generally.

EITK: Most of us can look back and remember less-than-ideal customer experiences. 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?

Amber: My most recent delightful experience was at Lowe's – the hardware store. I was buying flooring for a friend; he renovates houses in Southern Ohio. He found a great deal on some specific material in Columbus via the store's website and asked me if I could pick it up for him before it sold out. I went to the store location in question, but I couldn't find the material. The flooring representative, Jesse, spent a good 20 minutes with me trying

to determine if they had it in stock. It turns out it was listed as "staged" in their internal inventory, and they were getting ready to send it back to the manufacturer as it was being phased out, hence the low price. (This is an example of the importance of having the right data in the right place at the right time.) Jesse could have left it at that, but he called two other stores and found the same flooring marked for sale at an even lower price. The flooring representative at the other store, Casey, offered to pull the product and have it waiting when I arrived. They both took the initiative to research as far as they could to get to a solution and make it easy for me to get what I need.

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

Amber: My son is running track this season, so my Saturdays are spent watching and cheering him on. I am a formally trained artist, and I like to tinker around with making collages or coloring detailed adult coloring book pages. I also love to read. I read a variety of newsletters related to Learning and Development or Organizational Leadership, but I also love books about business, leadership, and personal development. (My top three are: The 15 Commitments of Consciousness Leadership, Atomic Leadership, Four Thousand Weeks.) For exercise, I do weight training and take daily walks. I listen to podcasts on my walks, and those are usually a combination of business news and "brain candy." My favorite podcasts are Pivot, The Jordan Harbinger Show (especially his Feedback Friday episodes), and whatever current true crime story gets a podcast.

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

Amber: Transparency, self-awareness, and an outward mindset. Being transparent in a respectful way leads to trust, which is the foundation of all healthy relationships. Self-aware leaders exhibit an authenticity that

reassures you that their decisions are sound and not based on an inaccurate picture of their role in any given situation. The quality of the outward mindset is one of the best takeaways from my time at Vroom. This comes from The Arbinger Institute's course, "Developing and Implementing an Outward Mindset," a company-wide leadership training I and others facilitated. To have an outward mindset in this context means seeing that other people matter like you matter, considering their needs, challenges, and objectives, and focusing on collective results. Wrapped up in this are empathy, openness to feedback, listening intently, and recognizing that we are all better when we work as a team.

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

Amber: Both have been excellent resources to get insight into common questions that come up for service teams. What tools are the best to use for a given need? What can I do to address X evolving technology or trend? The folks that make up the community are so graciously willing to offer advice and direction! Inclusion in the community has helped me expand my network to aid in my job search and to learn more about the areas where I want to develop my skills. I haven't been able to attend an in-person function yet, and I've only scratched

the surface with the amount of resources on the website. I'm looking forward to exploring more!

EITK: Is there anything else you want to share with our corporate CX leadership community?

Amber: I would say keep up the great work of supporting the community and spreading knowledge! Our human connectedness is what will get us through anything the world can throw at us. I'm grateful to be here with you all to share the experience! 🙏



Execs In The Know

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

Want to learn more about the KIA online community? [CLICK HERE.....](https://bit.ly/aboutkia)
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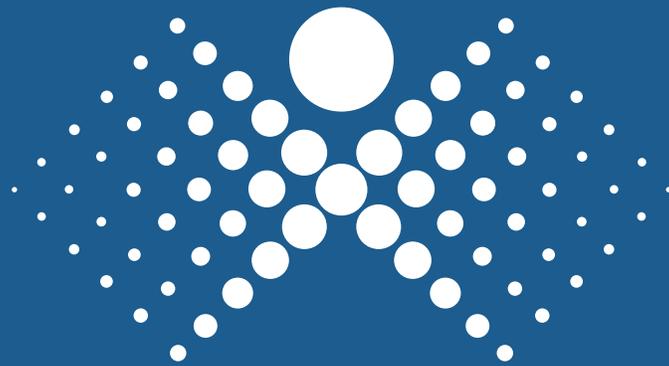
Our community has always been one that cares deeply – not only for the advancement of our industry but also for each other and the important issues that face our wider world.

Execs In The Know's Leading with Impact program goes beyond the boardroom with the goal of projecting time, resources, and attention to the issues that matter most to our community members, as well as their friends, family, and colleagues.

As part of our Leading with Impact initiative, we are partnering with NAMI (National Alliance on Mental Illness) and focusing on mental health awareness to help remove the stigma so often associated with it. We're challenging our CX community to take a stance and become a stigma-free leader, co-worker, friend, and family member.

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