Reimagining CX Metrics
in an AI-Driven World:

Practical
Strategies for
CX Leaders

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Checklist for Customer Experience (CX)

1 Define clear objectives

- **Pinpoint your goals:** Are you aiming to reduce response times, improve CSAT, handle higher volumes, or all of the above?

- **Align with your team:** Ensure everyone understands why AI is being introduced and how it supports your larger brand promise.

2 Select key CX metrics

- **Choose your must-track indicators:** This might include first response time (FRT), resolution time, CSAT, sentiment scores, escalation rates, or compliance benchmarks.

- **Set baseline targets**: Use current performance data to establish benchmarks so you can measure progress accurately.

3 Configure AI workflows and decision points

- **Set confidence thresholds:** Decide when your AI should escalate questions to human agents (e.g., sensitive issues, low confidence scores).

- **Map customer journeys:** Identify where automation can shine (like routine questions) versus where a human touch is essential.

4 Onboard and train your team

- **Brand and empathy training:** Ensure your support agents (in-house or outsourced) understand your brand voice and empathy standards.

- **Technical upskilling:** Give your team a solid understanding of AI's capabilities so they can optimize handoffs and troubleshoot effectively.

5   Implement oversight and monitoring

- **Use real-time dashboards:** Keep a close eye on AI interactions, resolution times, and customer sentiment in a single view.

- **Schedule regular reviews:** Set weekly or monthly check-ins to discuss any emerging trends or red flags.

- **Share insights openly:** Encourage a culture of transparency by circulating reports, lessons learned, and action plans across the team.

6   Run pilot tests and gather feedback

- **Start with a pilot:** Roll out AI features to a small subset of customers or queries.

- **Seek customer input:** Ask for feedback on clarity, empathy, and overall experience.

- **Calibrate:** Use this input to refine chatbot scripts, escalation logic, and any areas where the AI misinterprets intent.

7   Focus on continuous improvement

- **Track and adapt:** Monitor changes in metrics—like FRT, satisfaction scores, or error rates—and adjust your AI model accordingly.

- **Refine knowledge bases:** Update AI training data with recent product information or newly identified FAQs.

- **Celebrate small wins:** Call out improvements in specific areas (e.g., a drop in escalation rates or shorter average handle times).

8   Strengthen data security and compliance measures

- **Audit vendor credentials:** Confirm that any third-party AI platform meets recognized standards (SOC 2, ISO 27001, etc.).

- **Establish governance frameworks:** Define who is responsible for data handling, privacy checks, and security updates.

- **Document and communicate:** Keep your team and stakeholders informed about compliance protocols and any new security measures.

9   Regularly revisit goals and metrics

- **Reassess objectives:** As your AI matures, new opportunities or challenges will emerge—update your goals to reflect these shifts.

- **Evolve your metrics:** Consider incorporating more nuanced measures (e.g., sentiment analysis or advanced journey analytics) if they help capture deeper insights.

- **Stay aligned with your brand values:** Make sure new AI capabilities continue to emphasize empathy, customer respect, and transparency.

10   Scale responsibly

- **Evaluate resource needs:** If you're expanding AI to new channels (email, voice) or geographies, plan for additional training and oversight.

- **Balance efficiency with human touch:** Keep refining your approach so automation never overshadows genuine connection.

- **Stay agile:** Remain open to feedback, and don't hesitate to pivot if certain automations stop serving your customers effectively.

How to use this checklist

We suggest tackling these steps in order, but it's fine to circle back or re-sequence as you discover new insights or face unexpected challenges.

The goal is to continuously evolve your AI-driven CX, ensuring your customers feel supported, secure, and genuinely cared for at every touchpoint.

If you have questions or want more tailored advice, we're here to help you navigate the journey.