Reimagining CX Metrics
in an AI-Driven World:

Practical
Strategies for
CX Leaders

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AI-driven CX worksheet

Step 1: Define clear objectives

- What are your top three goals for implementing AI in your customer experience? (e.g., reduce wait times, improve satisfaction, scale support)

- How do these goals align with your overall brand values?

Goals	Brand Alignment

💡 Why this matters

Documenting your objectives makes it easier for everyone involved—executives, support teams, and tech partners—to stay on the same page.

Step 2: Select key CX metrics

- List the top five metrics that will help you gauge AI's effectiveness in your CX.
- For each metric, write down your current baseline (if known) and a target you'd like to hit within the next quarter or two.

Metric	Baseline	Target
First response time (FRT)		
CSAT		
Escalation rate		
Compliance checks		

💡 Why this matters

Having clear metrics ensures you can measure progress in a concrete, transparent way.

Step 3: Configure AI workflows and decision points

- Sketch a quick "decision tree" or flow diagram. Include the specific triggers that tell your AI when to escalate to a human agent.
- Identify two or three common scenarios where human intervention is non-negotiable (e.g., high-emotion interactions, account closures, legal or compliance issues).

🔲 Decision Tree Outline

🔲 Key escalation scenarios

💡 Why this matters

A well-defined workflow prevents customers from getting "stuck" with an AI bot when they need real human support.

Step 4: Onboard and train your team

- Outline a brief onboarding plan for anyone (outsourced or in-house) who will interact with or oversee the AI system.
- Note any skills or training modules your team will need (e.g., brand voice sessions, technical support on AI monitoring tools).

Onboarding checklist example

✅ Team training on brand voice/empathy

✅ Overview of AI capabilities and limitations

✅ Security and compliance briefing

✅ Shadowing sessions or "mock chat" practices

> 💡 **Why this matters**
> Your team's familiarity with both the brand and AI technology helps ensure a seamless handoff between automation and human care.

Step 5: Implement oversight and monitoring

- Decide what frequency of check-ins works for your organization (weekly, bi-weekly, monthly).
- List any dashboards, reports, or analytics tools you'll rely on to keep track of AI performance and compliance.

🕐 Review Frequency

🎛 Tools, Dashboards

> 💡 **Why this matters**
> Regular monitoring helps you catch any issues early—before they turn into bigger problems for customers or brand reputation.

Step 6: Run pilot tests and gather feedback

- Identify a small group of customers or a specific type of inquiry to test your AI.
- Note down the questions you'll ask pilot participants (e.g., "Was the bot's answer helpful?" "Did the tone feel authentic?").

Pilot Test Plan

👥 Focus group or customer segment	🕐 Feedback Questions

💡 Why this matters

A pilot helps you see how AI works under real-world conditions, revealing what's effective and what needs refining.

Step 7: Focus on continuous improvement

- Choose how you'll track performance changes over time—weekly charts, monthly reviews, etc.

- Brainstorm one or two ways to celebrate small wins (e.g., a shoutout in the company newsletter or a quick Slack message celebrating an improved CSAT score).

🕐 Review Frequency

🏆 Celebration ideas

💡 Why this matters

AI isn't "one and done." Adapting based on real data keeps your system (and your team) agile and engaged.

Step 8: Strengthen data security and compliance measures

- Write down a checklist of security certifications or standards you want to confirm with vendors (e.g., SOC 2, ISO 27001).

- List any immediate data governance actions you need to implement (e.g., access controls or regular security audits).

Security checklist

- ✅ Vendor certifications

- ✅ Access control policies

- ✅ Scheduled audits

💡 Why this matters

Transparent security measures maintain trust with both customers and internal stakeholders.

Step 9: Regularly revisit goals and metrics

- Compare your current performance to the targets you listed in Step 2. Where have you made progress? Where are you falling short?
- Document any new or updated goals based on what you've learned so far.

Progress Review

🏆 Wins

⌃ Areas for Improvement

◎ New Goals

💡 **Why this matters**

The market evolves, and so do customer needs. Periodic recalibration ensures you stay aligned with your organization's priorities.

Step 10: Scale responsibly

- Outline which channels (voice, email, chat) or markets you might expand into next with AI.
- Specify any additional training, oversight, or resources you'll need to successfully scale.

Scaling Plan

🔗 Next channels/markets	💼 Resource needs

💡 **Why this matters**

Growth is exciting, but scaling prematurely can lead to inconsistency. Careful planning helps you maintain quality at larger volumes.

How to Use This Worksheet

- **Schedule a working session:** Invite key stakeholders (support leads, compliance officers, brand champions) to collaborate on filling out each section.

- **Review and revise:** Circle back to these steps every few weeks or months. Update your answers as you learn more about what works— and what doesn't.

- **Share progress:** Keep the worksheet visible to your entire team so everyone knows how they can support the AI-driven CX strategy.

By working through each step in detail, you'll not only map out your AI strategy but also stay rooted in the principles that matter most to you—empathy, compliance, efficiency, and brand loyalty.

Use this worksheet to guide discussions, drive action, and track accomplishments as you build a customer experience that's both streamlined and genuinely human.