



AI for CX Research Results: **Unlocking What Works in AI-Driven CX Today**

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Your Webinar Hosts



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What We'll Be Covering Today

Scope and Objectives

- Fresh update to our 2024 study on AI for CX and customer success programs
- Global, cross-functional
- Dive into AI maturity, literacy, adoption, job changes, barriers, use cases, results, agents, quality assurance, and governance

Key Findings

- AI Maturity and AI for CX use cases
- Benefits achieved and cautionary tales
- Governance and QA

Interactive Q&A

- Your questions, our answers

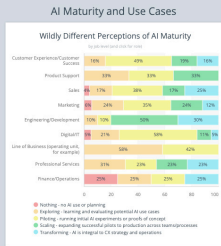
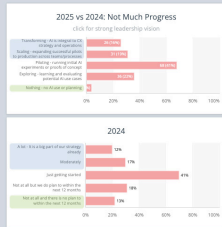
Demographics

- Top industries represented
 - Technology, Internet, Electronics, Comms
 - Professional Services
 - Advertising & Marketing
 - Business Support & Logistics
 - Utilities, Energy & Extraction
- Solid mix of B2B, B2C, B2B2C and organizational sizes (by revenue)
- Mix of functional roles (e.g., CX/CX, Sales, Marketing, LOBs, Digital, Professional Services, Dev., Finance/Ops)
- Mix of job levels

Guidance & Recommendations

- Actionable insights for your strategy

Key Themes



What would help you accelerate the adoption of AI for your CX programs? Key Themes:

Challenges with integration and standardization of AI tools highlight the need for improved workflows and better-defined processes to facilitate seamless incorporation into existing systems

Clear use cases and measurable goals are essential for successful AI implementation, allowing organizations to focus on specific problems AI can solve, such as reducing response times or predicting churn

Dedicated training and support for employees across different knowledge levels will enhance understanding and adoption of AI tools, ensuring that all staff are aligned with best practices

Trustworthy AI and transparent governance are vital for overcoming resistance and ensuring that AI is seen as a valuable asset rather than a compliance burden, which can enhance overall customer experience and enterprise value

Enterprise AI commitment and agility are crucial, as the

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Research results



What Would Help You Accelerate AI Adoption: from verbatim comments



1. Enterprise AI Commitment

There is a significant lack of an overarching **Enterprise AI approach**, leading to AI initiatives feeling like **side projects** rather than integral parts of the organization.



2. Clear Use Cases and ROI

A need for **clear use cases** and understanding of what tools will deliver the most **ROI** has emerged, highlighting the confusion surrounding the plethora of available AI tools.



3. Integration and Training Resources

Organizations require **dedicated resources** and time to **integrate** AI with existing systems and **training programs** tailored for employees at varying knowledge levels to ensure successful adoption.



4. Trust and Transparency in AI

There is a critical emphasis on establishing **trustworthy AI systems** with **transparent governance** and real-time explainability to alleviate compliance concerns and enhance customer experience.



5. Cross-Functional Alignment

Greater **cross-functional alignment** and visibility into available AI capabilities are essential for integrating AI effectively into customer experience strategies.



Benefits Achieved

Describe Your AI Deployment Successes: from verbatim comments



1. Improved Decision-Making

The implementation of AI tools has significantly enhanced **decision-making quality and speed** during **customer onboarding** by providing a **reference library of past situations and outcomes**.



2. Increased Efficiency

AI is **streamlining sales functions, personalizing product recommendations**, and **reducing average resolution times** for customer queries, leading to greater **operational efficiency**.



3. Enhanced Customer Experience

AI applications, such as **real-time voice mining and sentiment analysis**, have improved **customer service interactions**, resulting in higher **customer satisfaction (CSAT)** and better **first-call resolution rates**.



4. Proactive Customer Engagement

By **identifying at-risk customers** and **flagging early signs of dissatisfaction**, AI enables **proactive engagement strategies** that help **retain customers** before issues escalate.



5. Automation of Routine Tasks

The use of AI to **automate processes**, from **customer inquiries to content generation**, has **freed up resources**, allowing teams to **focus on more complex tasks** and **improve overall productivity**.

Governance and Quality Assurance



Who is Responsible for Managing AI Agents: from verbatim comments

- 1 Accountability for AI oversight is unclear**
with many expressing that **no single individual or group** is currently responsible for this function within the organization.
- 2 Collaboration between IT and CX teams is vital**
as oversight of AI agents should involve a **joint effort** to align technical integrity with customer engagement goals.
- 3 Leadership and governance structures are mentioned as necessary**
for the successful adoption of AI, particularly emphasizing the need for **cross-functional leadership** to ensure alignment and effectiveness.
- 4 AI champions and guardians exist across various departments, but their roles are vague**
indicating a need for **clear responsibilities** in managing AI agent performance and integration.
- 5 Current implementation efforts are hindered by a lack of clear ownership**
leading to a **fragmented approach** where **individual team directors** are managing AI with **limited success**.

Future Priorities: from verbatim comments



1. Seamless AI Integration

Incorporate AI into **existing systems** to boost **operational efficiency** and enhance **customer experience**.



2. Data-Driven Predictions

Leverage data to anticipate **customer behavior**, **reduce churn**, and enable **proactive actions**.



3. Augmented Agentic AI

Develop AI tools that augment **human agents**, improve **workflows**, and facilitate **personalized interactions**.



4. AI Proficiency & Training

Raise **AI proficiency** across the organization for **effective utilization** and management of AI technologies.



5. Outcome-Driven Automation

Target **high-value use cases** like **call deflection** and **churn reduction**, measured by **customer trust and satisfaction**.

Key Insights

1



AI Use Cases & Deployment

- AI is primarily deployed in pilot programs for engagement and service, with conversational AI driving innovation
- More advanced solutions are planned for the coming year

2



Benefits & Challenges

- Clear benefits and accelerating adoption
- Challenges like organizational readiness, integration complexities, and lack of standardized strategy hinder scaling AI projects

3



Strategic Priorities & Barriers

- Leaders prioritize refining AI strategies and governance
- Operational risk, unclear best practices, and immature governance frameworks are key barriers to wider deployment

These findings emphasize the critical need for robust strategies and governance models to maximize AI benefits in customer experience while effectively mitigating risks.

Wrap-Up



Next Steps: Your AI for CX Action Plan



Lead Visibly & Govern Responsibly

- Be **deliberate and communicative** about which **jobs are changing** now vs later – and how
- General guidance is to **centralize AI strategy** and mix execution between **corporate and local**
- Establish **cross-functional governance** and an **AI council** or **COE** with **leadership visibility** and **responsible AI frameworks** that balance **innovation** with **compliance**

Focus on & Measure Adoption & Readiness



Focus on individual AI readiness and showcase leadership examples



Build AI skills through targeted training with clear metrics:

- Sales: AI-predictive analytics, next best purchase
- Customer Service: Personalization and onboarding
- Integrate AI champions and peer training into talent management



Address adoption barriers, especially data and integration challenges





Re-think & Re-prioritize Use Cases & Measurement



Build on AI Progress & Core CX Strategies

Build on progress in **AI for CX automation** and **productivity** and look at **core CX strategies** such as **value realization, product recommendations, cross-sell & upsell, and proactive engagement** as your end game



Implement Company-Wide KPIs & ROI Accountability

Implement **company-wide KPIs** that track both **internal adoption** and **customer experience outcomes** with clear **ROI accountability**

Your Questions

Thank you!

Questions? Let's Connect!

We're passionate about customer experience, customer success, and AI – and would love to hear your thoughts. Feel free to reach out with any questions, comments, or suggestions.

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