



Making CX Investments Pay – A Chief Customer Officer / Chief Experience Officer
Discussion – Jan 26, 2026
Transcript

Tabatha Dunn

Yeah, so it's great to be here with everyone. I am Tabitha Dunn, and I am based in Bellevue Washington, and I have over 20 years of experience in building and leading customer experience practices with a deep focus on driving customer centric transformation that leads to you better outcomes for our customers, our people and our business at the same time. So I'm excited to hear your questions today and see if we can't give you some practical advice to take away and I'll hand it off to Curtis,

Curtis Kopf

thanks, Tabitha, and all. My name is Curtis Kopf. I also happen to be in the Seattle area, coincidentally. And I will just say, part of, I think, the spirit of this and all this is community. And when I started my journey, Tabitha was one of the very first people I met, and one of the very first people who kind of helped me along. So Tabitha, thank you. You're you are a great citizen of the world of CX, and I think that's what we're all here for. Um, I customer experience like Tabitha, has been my path passion for a couple decades. I drank the Kool Aid, so to speak, at Amazon in the very early days 1999 while living in the UK, and I've done that the rest of my career, and really had the privilege of leading customer experience programs at an airline, in healthcare, in retail, and currently I work for a company called insulet, Who is the leader globally in wearable technology for people with diabetes. So anyway, thrilled to be here, and one of the other kind of gurus and thought leaders who really influenced me in my journey is Michael Hinshaw. And through Michael, a lot of what you've written and done, and so I'm a lot of gratitude to you, and I'll hand it to you.

Michael Hinshaw

Thanks so much. Curtis, Curtis Tabitha Graham and all of you who are on webinar with us. Absolute pleasure to be here with you today. My name is Michael Hinshaw. I founded M Corp CX customer experience consulting firm, or customer and employee experience consulting firm in 2002 so a couple of decades plus experience, and when I started this. Think customer experience was really a nascent phrase, so to speak. And there wasn't a lot of conversation around you know? Why is Cx important? What does this mean? How do we



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organize the conversations were, how do we drive additional business value? By focusing on this, customers and employees. And that really hasn't changed over the last couple of decades. So really interested to hear from Curtis and Tabitha as we kind of talk through some of the questions that you've brought to brought to the table today. So thanks very much. Great.

Graham Clark

Thanks. Michael Graham Clark, my role in life is connecting people together in the CX community that I've dedicated the last 30 years of my life to. So today we're going to we're going to focus on some, some fairly simple topics. How we got here, by the way, back in September, Curtis published an edition of his newsletter which will provide a link to it's an awesome thing. If you're not subscribed to his LinkedIn newsletter, you really should be. I've no idea where he gets the time to write it, by the way, the and he talked about customer experience operating systems, which is a particular thing for M corps, CX, we'll send you information on that, also separately to this. And so from there, it's like, well, maybe we should chat about that and why that is important. And that kind of morphed into, well, how about we have the community tell us, what do you think is important? Which is a radical idea. And so what we're really going to focus on today is kind of what's worked and what's not, in the companies that Tabitha and Curtis have worked in, and Michael has worked with. What is the CX operating system, and Why might it be important? And then a little bit of, kind of, what would you do differently if you could, and why? And having said that, if I can click the right button without shutting down the whole thing, which is always a danger, get rid of the slide where now it's just us so, so that's our intention. Cover those things. We have five questions that we've kind of distilled by consolidating the information and the questions that you sent so, so, without further ado, probably the most questions we got were all about CX ROI. Surprise, surprise. And so, you know, what have you seen organizations do that kind of allowed for some to focus on CX ROI. How do you make it sustainable? You know? How does this operating system fit in? If it does, and kind of that whole issue about, how does CX maximize its relevance in the organization and therefore continue to encourage support and investment in those organizations? So you want to start?



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Curtis Kopf

Curtis, sure. Thanks, Graham, these are all meaty questions. I. Think maybe I'll give a concise try to be concise, two part answer. I think the idea of an operating system and how that connects to ROI is they think we've all probably experienced when CX is a team or program that is like a subset to what the company does, and I think that creates a lot of challenges. So the operating system, to me and how it connects to ROI is customer experience is at the center of the mission. It's at the center of the strategy. It's operationalized and everything the company does. And I saw that an Amazon just built into every single thing that we did on in I experienced it in my role today. And I think that becomes important, because when you're evaluating ROI, you're not evaluating a Customer Experience Program independently of the strategy in the core business of the company. That's when you know, people get hurt when you try to do that. Fundamentally, I think for me, what it's about is it's always an and I never, in my role, bring to the table a customer experience initiative that does not have business value. In fact, in most instances, there's a Venn diagram where you get both things. And so I'll give a couple of practical examples, and then I'm sure Tabitha and Michael will have more to add real obvious use cases that I've seen that I think apply almost anywhere. If you remove friction from the experience, if you add self service options, if you make customer service more efficient, these, these are like canonical I feel every organization I've ever been at has them. You will make the customer happier, and you will save a lot of money, in my experience, literally millions of dollars, and you may impact revenue and cost to acquire all those things. That is like a canonical example. I think the other one, I think a lot about, is retention of customers, whether you're a kind of subscription, recurring revenue business or not, if you lose customers, is bad for your company's revenue and profit, and so I think that's another, just very concrete example of where I think people working customer experience. If you can develop programs that make customers more successful and they don't churn, and you can show the lifetime value that comes from that you are combining what's good for the customer with ROI. So I'll pause there. I know Tabitha, Michael will have tons more. Tabitha, maybe I'll hand it over to you.

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Yeah, I couldn't agree more. Curtis, I found that having done this in in seven different companies, the best way to figure out how to ensure you have that ROI built into the way you operate is starting with the operating system of the company itself. Even when I am both like interviewing for a new opportunity or I am coaching a CX leader, I look at, well, how do you make decisions in the company? Who decides what does a great business case look like? How does you know the budgets get allocated, really understanding when those difficult trade offs are made in the business? Because there is, every year, a laundry list of long things that everybody wants to accomplish and invested, the business has to make decisions about what they're going to invest in, and CX is going to be on that list. So you have to understand how those decisions get made in order to ensure that when you make those investment proposals and you say, here's the short prioritized list we're going to go after, absolutely it has to be here's how it's going to help our customers. Here is how it's going to help our employees. Here's how it's going to help our business. But also you have to frame that case the way the business makes decisions. So if, for example, you work for a company that has Lean Six Sigma in it, well that's one of the ways that they make prioritization and decision making and investments. So you have to really be able to plug CX into that value chain with inside the business, if the company really cares about growth. Then every time you're going to build a case, you have to be able to say, how is this going to help our key our business grow? And I think Curtis made an excellent point when he said, By the way, retention is part of how you grow, because every customer you retain, it helps you build your growth momentum. And I think that is really an important part of a CX leader, is really understanding how those decisions get made. And the last piece I live leave people with is it's super important to understand why your peers and their bosses what matters to them when you're building a case, if you build it around things that matter to them as well, it's kind of how you get them to buy into your decision making. So that I will hand it over to Michael, have his wisdom. Um.

Michael Hinshaw

Tabitha, appropriately took some of my planned thunder in that, but it really is the with them, right? What's in it for me? So as we think about how to frame customer experience as a focus or a priority, it's understanding organizational care about leadership priorities and kind of what's in it for me at different levels of the organization. So you can frame the going



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back to some of Curtis's examples, how we reduce friction throughout the life cycle and basically increase, I'll call it retention of progress from one stage of the journey to the next. You know, increased acquisition, lower cost to acquire greater attention over time. All of these things are linkable directly to customer experience of being able to do so in a way that helps executives make decisions that are good for them and for their customers, that they internalize the reasons why they're important. Say, Oh, this is actually a good thing for me personally, and it's also good for the business and center customers, which is kind of the way I think most executives think in terms of priority, great,

Graham Clark

great, perfect, really interesting stuff. But I'll throw an extra one in there. So somebody I didn't manage to get for this call, but maybe we'll get to do another one, is a general by the name of Brian Sanders, who's at triple A and in Orlando, Florida, down here in the Sunshine State. And one thing I've seen over six years of knowing him, which is amazing, is the ability voices. So the ability for a CX leader to talk in the voice of the functional constituencies in the company. So talking to a growth leader is different to talking to a CFO is different to talking to the regulatory people, is different to talk in the IT people. And this ability to have conversations a little bit like the United Nations, right? There's conversations with all kinds of different people understanding what it is that they care about. So one of the other questions we got, which is kind of the same topic, given the struggle that a lot of CX leaders have, and a lot of companies have in sustaining investments in kind of CX management as an overall discipline and a practice, it even ripples down to the most popular CX capability, which is, voc, right? Other companies have voc, you know, how do you, what have you seen work in terms of really, kind of getting to that point of the other side of the ROI equation, which is, how do you, how do you get organizations to commit and sustain those investments over, you know, years to actually, actually continue this rather than flashing the pan. Maybe start with you.

Tabatha Dunn

Tabitha, yeah, a lot of that comes to the fact that, you know, you mentioned voc, and you know, I think that one of the superpowers for CX teams is the fact that they listen so



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intently, both qualitatively and quantitatively, to customers. But one of the things that I find fascinating about that is that they neglect to do the same thing for their peers and their the bosses and those different functional areas. If you understand part of like what the goal not only what the goals are, but like, part of what really matters to them, from a strategy perspective, that affects where you can help make a difference, it really has a powerful impact on how you really stay relevant and stay engaged with your peers. So for example, not only do I do a listening tour when I start a new role, and I really talk about CX in terms of, how does it help legal, how does it help finance. How does it help HR, how does it help? It not just all the customer facing teams, but I actually repeat that to her every year as part of my strategy building process. I really go into, how do we spend time with each group? And say, what are the big challenges you're trying to get? What do you need to get approved next year? What are your biggest pain points? Because as part of the process, if I can help solve those, then I know that I can get their buy in and their commitment to saying, You know what, I really do need this. And a great example is, years ago, I was trying to get a project across where we have three separate customer portals, which was a real pain for the customers. They didn't know which one they needed to log in for what task they were run by different groups had entirely different user experiences, and it turned out that the way to get it funded when all three groups didn't want to give up their portal was to go and talk to it, who had to maintain and develop every single one of those portables every year. And so if we actually collapse them into one portal, we could not only give him a much easier job to manage and develop and improve, and he'd have a much better budget control over that, but I could actually enable each one of those three organizations to have more features, like, what were the top five on their wish list that they wanted as features and capabilities in the Customer Portal, and as part of the process, I said, if I can get you those five things, and we all move to one portal and we build a governance process going forward and. Would you go for it? They were like, yeah, those have been on my list for years. And it was like, You know what? It actually costs us less money if we build one and we add all of those features. So it was really not just thinking about what a customer needs was. It was what was the needs for all those groups that touched those pain points and building out something that really help their lives be easier, right? If you are not good at sales and negotiation as a CX, here you should get at it. Yeah? Absolutely, absolutely, okay.

Curtis Kopf



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Curtis, yeah. I mean, just to build I Tabatha, I think it's really well said. I think, Graham, you asked about Voc and sustainable investment, and they, I think on the VOC, just combining those two, on the VOC part, I I really believe everything starts with a deep understanding of the customer journey. Every great organization I've been at. You know, whether it's Amazon or Alaska Airlines or Rei or insulin, every market leader like successful top line, bottom line customer, they obsess over the journey, and they understand it better than their competitors, period. And therefore, Voice of the customers is, like, very critical to that. I remember, you know, I think the practical examples, like, like you gave Tabitha, those are always like, they really bring these to life. We created a robust Voice of the Customer program at Alaska Airlines, which is a Seattle based West Coast airline. And it was really interesting. You think you know what the customer cares about. You think you know what their pain points are, but in often, you largely do. But we found out, as in, very practically, that two the biggest pain points were things that were not on our radar screen. One was Wi Fi. Was the number one by far, the airlines have come a long way in fixing Wi Fi. And the other one was we were running out of fruit and cheese platters in like row 15 on all the coast to coast flights. We didn't know problem. As an Alaska airline flyer, I would agree, and I think these are the kinds of insights until you ask the customer, and I think then, as Tabitha said, that has to be combined, that voc alone is not sufficient. Has to be combined with quantitative data and a lot of other things to get that really robust picture. I think just two things I'd add that I've learned over the years, it's not very exciting to most. You know, we all think differently. Some people are very quantitative. And there are people want to know, why did your CSAT score go from 89.2 to 87.1 or why did your NPS number do X? And you must have that. But as as people have said before, you can't just chase a number. You have to understand the story behind that. And where I've found organizations get really motivated and inspired on voc is when you tell a story and use the customer's own words, give the number, you have to give the number. But what moves and inspires the organization are the words of the customer, which might be wonderful, or they they might break your heart. The only other thing I'd say, I think, just in terms of sustaining is that I think the great CX leaders, like, you know, the colleagues I have, the you know, the privilege of being in this LinkedIn live with they, they, I think these days, they think like general managers, they're they understand the P and L, they understand business outcomes. And I've found in CX roles, my very best friend is my finance partner. I just always, I start with finance. Everything has a business case, everything has financials. Make your finance



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partner your very best friend, and that's a huge success factor. Michael, I'm sure you've got other tips we touched.

Michael Hinshaw

Well, there's, I mean, VO dot, dot, dot, right? Customer, employee, partner, executives. I mean, all those things are absolutely critical. One of the things that I think I just add to what David had Curtis have been talking about it, and this is ridiculously self evident, but surprisingly not always acted on, which is the listening to storytelling is critical because you need to make it human right. Experiences are emotional. They're human by their very nature. I mean, we all interact with the world through the lens of how it makes us feel, and the customer experience as a discipline is all about making people feel better, so that they do the kinds of things you want them to do. As a business leader, but that listen. Learning System. Oftentimes it's in place, and virtually every organization has listening of some sort, but actually taking that, linking it to business value, by sitting down next to the finance leaders, to their organization, or the functional business leaders, and saying, Okay, we have to do something about this now. So just telling the stories is critical. But if you don't tell the stories in ways that actually drive action within the organization, and again, self evident. But I can't count the number of organizations that we've worked with and talked to where they have listening in place, but they don't actually do what they need to do with it. And I'm sure that both of you have watching the situations where you're going, what? What have you been doing?

Graham Clark

I have a quote which comes from a client financial services leader, and she says that while ideally, every single executive would care deeply about a customer, and they do, you never find a C suite executive who says, I don't care about customers, that they do, but they don't necessarily prioritize actually finding out what those customers think and want. Back to your cheese platters. And this is what I always love about what she says, and she's a she's a marketing executive or CX is that she said, maybe it isn't their job to care. Maybe it's the job of the CX leader to figure out how to make them care. And so back to CX as sales, or sales of CX in the role is when you look around at those constituencies, finance, legal,



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procurement, it digital finance. You know, how do we present the brilliant insights that we get and the important stuff that we know as CX leaders in a way that motivates the organization, which kind of leaves us a nice question, by the way. So when you, when you think about growth, which seems to be top of mind, let's say growth and operating efficiency, those two things can probably cover the most corporate mandates in 2026 What do you you know? What are the key, maybe voc initiatives or other CX initiatives, or operating system components that you see as most tightly related to getting to outcomes faster, because speed is kind of the watch word, and maybe there's some anecdotes you can tell about how that's worked, rather than some theory. So we'll go ahead and take the other way. I'll start with Michael, and then go to Tabitha and then

Michael Hinshaw

Curtis, yeah, so I'm going to make this pretty short, because the majority of the specific examples I can give are examples that I can give because they're, they're, you know, climb examples, but I think that, you know, Tabitha and Curtis, you probably have greater insight into This. But as we're looking at things most tightly linked to revenue growth, I think that the two biggest areas are service and related cost and retention. How do you keep customers longer? I think Curtis and Tom have both talked about that earlier, but it's remarkable to me, the degree to which organizations focus on, just in general, broad statement, focus on acquisition new customers more than retention of existing customers. And as a as a business person at heart, it still befuddles me that there isn't more attention put on what do we need to do to keep the customers? We have to increase their share of wallet or penetrate their organization? More broadly, there's more and more budget energy around the marketing side of the world than the service and retention side of the world. Again, that's a broad general statement, which isn't 100% true, but I've seen it, and feels like it's mostly true. So I don't know. Tabitha Curtis, I'd love to get your thoughts on that what you've seen in the trenches on your side of the table,

Tabatha Dunn

you know, if I, when I think about the OC, I think that, you know, for a lot of people, what they think of is it's listening and it's analyzing. But I actually follow a model that I built this



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called listen, learn, act, measure, communicate, and the Learn piece is, I think, one of the bigger challenges for most people, once you've been listening to customers, the next step of learn is really, how do you tangibly sit down and say, All right, so if this is a pain point for our customers, what happens on the customer side, when we get this wrong, what's the impact to them? And when we get this wrong, what's the impact to our business? It's part of how you start from the very beginning, building that business case. And the reason I look at the impact to the customer and to our business is first on the impact of the customer. Sometimes you might fix a problem that doesn't happen very often, but when it does happen, it has a massive impact – on the customers and creates a high likelihood that they're going to leave. Well, that might be a problem that's very expensive for us to be able to let just keep running, but we might not notice it because we didn't take the time to dig. In for root cause and understand the impact that it has on the other side of the equation. When it talks about, you know, what the impact to our business is? I can't tell you how many times I've looked at a problem and said, once we got to that learn phase and went, Oh, I Gosh, I'm really confused. This happens to a lot of customers, but it has very little impact on our business and has very little impact. This maybe isn't the problem we should work and so, you know, you learn so much in that. And I think the ACT sounds fairly obvious. Measure is fairly obvious. But the last piece is communicate. And this is the piece that I think most people miss. One of the things I did when I worked for Concur is I created an annual customer report. And I've told this story many times, and I'm still surprised at how few people do it, the annual customer report showcase teams all across the business the previous year who actually listen, learned and acted on customer feedback. Was like, you told us this matter to you. We heard you, and we did something about it. And here's a sneak peek at some of the things we probably are going to pick up this next year. It went to every customer facing employee, went to every executive, then went to every customer, whether you gave us feedback or not. And over the years, what it meant is, as I was basically teaching our customers, the more quantitative data I have the bigger case for change I can build, and the more likely we're going to do something about it, so that I actually had customers coming up to me at customer events, going, when am I getting my NPS survey this year? It's random, and I know it comes out every month, and somebody gets it. Can you please make sure I'm still on the list? I'm like, Would you like to tell me your pain points? I'll tell you, I just want to make sure it gets in the case like they were lobbying each other to get so because they were like, we know this actually works. And the last piece of that puzzle that people don't understand is, if you heard the customers and you made a



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change, if they don't know you did it because you heard them, you lose the benefit of that now they trust you more and like, Wow, you really do care about me as a customer. You only make the change they don't know you did it because of them, and that's an incredibly powerful way to build trust and customer loyalty.

Michael Hinshaw

I love that loop also, because not only do you create awareness with your customers, executives and leadership recognize that this is something they need to pay attention to, because the customers are clamoring

Curtis Kopf

for it. I love that example, Tabitha, that that's like a good, repeatable best practice. I think just build in terms of, like, what are repeatable mechanisms? Cost to acquire, cost to serve in Michael retention, what you said, which I think is, is probably where it all comes together. And I think what I've seen in organizations is where their focus varies on, is it a mature organization that is growing more slowly? Is it a high growth organization where acquisition of customers is really important so? But I think it all begins with the data and insights, which I know I feel like we've said a few times, but I think that is the key, and where a customer experience team can add so much value to to the organization, and I in a lot of places I've been, we haven't out of the gate, we haven't had all the metrics. And that's okay, because you but that's where you need to start. Something I learned at Amazon that has served me really well everywhere I've been is this idea of inputs and outputs. And so, you know Michael, you talked about retention. So whether it's retained customers or treated customers, that's very important. That's an output. If you only focus on the output, you won't make progress. You have to understand the drivers and the inputs and and I think that's one of the most powerful things you can do in a customer experience role. If you know Michael to your point, you say, hey, retention is a big opportunity for us. We've already invested the money in acquiring this customer on we should make sure we retain them, then really understanding the drivers and taking the time to do that analysis is so important. I think the only other thing I'd add, which is something I've encouraged everywhere I've worked is is a mindset in the the willingness to run pilots to test and iterate



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and learn. You can if, if you're willing, if you can identify Low risk, low cost pilots and experiments, you can learn a ton. And it's really struck me that a lot of organizations, they don't do it and and I even think people are sometimes afraid to do it, because they'll get in trouble. What if it fails? And so I'll give an example an organization where we were on the journey around customer retention. It was new, because we had been very focused on customer acquisition. And. We started out by understanding the drivers, why we built a predictive model that actually could predict when a customer is going to leave, and I asked the team to just start calling them. Just take a small sample set, take a couple of agents and call them. Why? Just find out what their problem is, and that that turned into a scaled program that is retaining 1000s and 1000s of customers by starting with a very low cost, low risk experiment. And what happened was we found out why customers were trading, and that's like, to me, a holy grail, because you are helping the customer live a better life in you are delivering back to the organization 1000s and millions of dollars. And I think, as a customer experience leader, when you find that holy grail of good for customer, good for business, you know, I think, as Tabitha said, that that's like the that's flywheel that starts turning where the organization starts giving you more money and more investment and more credibility.

Michael Hinshaw

Yeah, there's a fear of failure. Piece of it, that's something I think it's very difficult for people to get get over and you know, their roles in an organization, because so you think about engineering, for example, engineers, they look at failure all the time, and in most businesses, failure. Why do things fail? How do we make it better? But if you don't talk about failure, failure is a bad thing. A friend of mine, Mark Cooper Smith, actually wrote a book called The other F word, and I think that Curtis your point around small, low risk experiments that can expose broader opportunities is a real kind of call it critical, you know, habit or mindset or ability, because at the end of the day, if it does, if it doesn't work, it's not a big deal. You're not bettering, you know, the organization or huge budgets on it's just incremental shifts that can actually have pretty significant outcomes.

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Yeah, I'm a huge fan of test and learn and celebrating failure. Run multiple pilots, and when you find one that's successful, don't just celebrate that one. Celebrate all the failures, and we cross something off the list. People thought that would work, and it turned out it didn't, isn't it great? We know it doesn't work.

Graham Clark

We don't have to do that anymore. Exactly.

Tabatha Dunn

We could say, Nope, we tried that, and it does not work and it doesn't solve

Curtis Kopf

the problem. Oh, sorry, just to build on that, I think as a leader, that's where for all of us in leadership roles, I think, Michael, to what you said about the I mean, look, we're humans. Are wired for feel fair fear, fear of failure in the corporate world also can feel that way. And I think that's one of the most important things we can do for leaders as leaders, is to create the guardrails. What is acceptable risk, you know, like, because you can't just do anything clearly, and then you gotta encourage your team. And then, Tabitha, to your point, I think you guys celebrate the failures, you know, like, put them in a megaphone and in, by the way, in the successes too. But I think creating an environment where our teams feel comfortable doing that is one of the most powerful things we can do as leaders.

Graham Clark

It's really good. I feel like such a success, if failure is the metric. So another attribute of CX leaders is agility. So, so I listed the questions for the participants and those listening. Somebody reverse the last two based on the way the conversation. So it's, it's January 2026, although scarily, it's almost gone. So this would not be appropriate without discussing the AI word. So we did get a bunch of questions around. You know, we talked



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about how CX makes itself relevant all the rest of the stuff. You know, organizations today are being hit by two very powerful forces. One is the kind of overwhelming grab of attention span by AI correct, correctly, I assume. And the other is the uncertainties in organizations. You know, various different economic challenges that organizations have and the changing economy so, so, you know what? What's your advice to a CX leader sitting here in January 2026, you know, recognizing that that CX in many organizations is still somewhat struggling to get that level of relevance that it deserves. And in addition, you've now got these, these two incredibly powerful forces of kind of the rise of AI and and the economic uncertainty that kind of comes with it. What should we start with? Curtis, what would you say to a CX leader if they called you up tomorrow and said, Hey, what do I do?

Curtis Kopf

Give a two part answer? I you know, it's a great question. Full disclosure, I'm a techno optimist. You know, there are many scary things about AI, but fundamentally, I'm optimistic, and I think having ridden the digital transformation wave for the last two plus decades, these things go through phases of misunderstanding, fear, anxiety. What is it hype? And that's where we are with AI. So I'll say first of all. There was so much interest, I'm very bullish on AI. I think the key mindset is AI is a how. AI is not the what or the why, the customer is the what or the in the why. And I try to say that all the time to my business colleagues, don't start with AI. It's not, it's it's still about the same things. What are the customer problems in the business problems? AI is a way to solve that, and I think it's a tremendously powerful way to solve that. I'll give a very concrete example, and hopefully these, these are not, you know, boring, but I, I run a large scale customer service organization. AI, in that is one of the earliest use cases of AI, we have made so much progress serving the customer better, because today we have AI agents. AI capable is helping agents, helping the people who serve the customer, not replacing them, helping them, helping them with next best action, taking away all the the administrative tasks that most customer facing employees hate anyway, let ai do that stuff and let those employees do what they love, which is taking care of the customer in a way that a human can't. I could go on and on there we are just scratching the surface. We're in such early days of AI, and I would say as a CX person, and I'm not suggesting anyone's afraid of it, but don't be afraid to be the best at your company. Be the person the whole organization comes to and says that



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CX team over there is a model for how to leverage AI. Be that person. And I guarantee you your CEO, your board, will want to hear from you, because it's top of mind. It's not a what or why, it's the how. And I think that the only other piece I'd go back to Graham sure question is like beyond things like that, I still think it goes back to the fundamentals. Understand your customer better than your competitors, and use that solve customer and business problems that that is like, downturn, upturn. It doesn't matter like, fundamentally, that is how you're going to be successful and valuable in your organization. And Graham, you didn't. I don't have a who's next. So Tabitha, I'll kick it to you.

Tabatha Dunn

I couldn't agree more Curtis and I I've some I'm someone who has actually run multiple technology organizations within a company, as well as I'm a startup advisor for agentic AI technology right now, and big part of my role is, how do you ensure that the technology it's solving the right problem. So I think of it as a marriage between my Lean Six Sigma background and my design thinking background. And I think about it as make sure you're falling in love with the right problem to solve, and that you understand what the root cause or causes are of the problem before you decide on a solution. I was just actually giving a keynote to a massive organization this last week and told them the exact same thing, like, if you don't know, here's exactly what problem I'm trying to solve for what humans both inside the business and outside the business. What's the root causes of that? Then you go, what has to change with the way people work, what processes have to change, and what's the right technology to help facilitate that change and make it work the best? And that is, you know, one of the best, best things about AI is that it's making it so much faster and easier to solve those types of problems, but it's so sexy and interesting that people start with the technology first. And I'm like, wait, but what problem are we solving for? Who? How do we know this is going to be the right solution? And they're like, oh, but it says it will be, and I'm like, I get it's so frustrating, right?

Michael Hinshaw

Yeah, we've all seen before,



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Tabatha Dunn

right, right?

Michael Hinshaw

So this is not like net net new behavior. It is a net new approach to leveraging AI as a technology to solve problems, but to your point, out what problems you actually trying to solve and what problems should you be solving. The problem is AI,

Graham Clark

great, so I'm fervently hoping that GoToMeeting, but just counting down our meeting recognizes that we set it for 45 because we've not run over anyway. So it's good. I love a quote from Elon Musk recently where he said, But to your point, Curtis, he said, is, it's better to be an optimist and a little bit wrong than a pessimist, who's right, which I think is how we should look at AI, right? I mean, it's like it's it's Firstly, it's coming, and none of us is going to stop it. So we might as well figure out how to embrace it and be the be the leaders. So talking to Lee. Is, if you given all the other challenges, and you'd be a pessimist, and right, but given all the challenges and struggles that CX has in organizations, CX leaders have, if you were, if you were talking to a CX leader today, or somebody who's, you know, mid career, or whatever, who's thinking of moving into that function, which happens a fair amount, what would you talk to them about in terms of, you know, the career in CX versus a career in marketing or digital, or, you know, all the other places customer service, so they could be spending their time. We will start with Tabitha on that, then go to Curtis and Michael, and then we'll wrap

Tabatha Dunn

up, sure. So I would give, I would give two halves of that answer. If you are someone who's looking for your first senior CX leader role, or you're looking for your next senior CX leader



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role. The real trend here and Curtis is a great exemplar for that, which is that you need to be able to have the background and experience where you know how to run different parts of the business, as well as lead CX effectively, Curtis talked about how he owns the service organization that you should be able to lead things like in post sales or like, my background is a lot is in operations and service and customer success. Like I can run those functions, it can run technology while I lead customer experience. And it gives me a great seat at the table. That's not a CX thing. That's practically every C suite leader or senior VP, you see, owns multiple parts of the business, not just one part of the business. So you really need to diversify your skills and experience and capabilities there. And if you're new to CX, and you're wondering if you want to get into it, find your passionate way in. Maybe it's design thinking, maybe it's really creating journey centric experiences and working on jobs to be done. Or maybe it's voc, but becoming an expert in one of those and then broadening out of your vertical is the best way to become a CX leader in the future, if you're just starting out.

Curtis Kopf

Curtis, I totally agree. Tabitha, I just just an add to that. I think success where you know wherever we are in our journey and customer experience. One know your customer better than anyone. That's where the value comes from, I think, as we talked about a lot, understand the business, be that, that CX person, whatever level you are in the organization, who understands the business, understand the strategy, understand how your organization makes money. That's one of the blind spots I've seen sometimes, is thinking that CX is separate from that, understand the strategy of your company and try to align your work with the biggest problems that the customer in the business is trying to solve. I think, beyond that, I just say, take chances. I you know, I've taken chances in my career, in almost every time I've said, Oh my God, what? I'm going to an airline, what? Or I'm going to a company in 1999 selling things online that's losing money. What? Every time those have been the best moves in my career. I'm not, please don't take crazy, ridiculous risks. Be but takes,

Tabatha Dunn

yeah, right, because they don't have problems to solve. Be the problem solver.



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Curtis Kopf

Yeah, I think thirdly, learn, just be a continuous learner. And then I think fourth is just this community. I feel so grateful because early on in my career, there were people like Tabitha and Bruce Temkin and Michael and Graham and Jean Blatt, people who helped me because I genuinely expressed a desire to learn in have mentors. Please do not be shy. You know, as long as you're, I think genuine and respectful leverage the community we all want to help each other in, conversely, and I know everyone in this, all four of us do this. If you're more senior in your career. I think we all have an obligation to mentor and help others and give back to the community. I know I wouldn't be here today if there were three or there were three or four people who really changed the trajectory of my career, and for more senior people, it's our obligation to do that for others. So I don't know Graham or Michael. I don't know which one of you would

Graham Clark

like to

Michael Hinshaw

Michael, yeah, I think not having been officially in the seats that both of you have, I can speak observationally. The things that I've seen CX leaders that I've worked with be both best at and most passionate about when they're succeeding, is curiosity, like, what? Why is this happening, right? And that goes to have with what you're saying, you know about solving the right problem, right? You got to ask the question sometimes way more than five times, right? It's like, what is going on here? But, but also, I think the. A really interest in the human condition. It's really understanding how, how the things that we do affect people. And then the last thing, and Curtis, this really lines up with what you and you Tabitha are saying, is understanding how the business works. It's not customer experience. Is not this thing over here, I've seen customer experience, you know, leaders. I say, you know, some parenthetical, leaders that don't understand the business at all, and they actually have a hard time succeeding. I've seen business leaders that understand the customers deeply.



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Are they CX leaders? They kind of are, but their role is head of, you know, head of sales, or head of service, or whatever that might be, something separate. So, yeah, I think it's that curiosity and really understanding what are the drivers of economic success of the business. Is if you get your hands around those two things, I think that the path for CX leader, or any career at CX, is going to be easier for you to follow.

Graham Clark

It's tough. So we're coming towards the end. So, so in the in the downhills, watching downhill snowboarding this weekend. So not something I plan to do, but that's okay, the in wrap up. So if there's, if there's one thing you know, thinking, let's pretend we're here in January 2027, looking back, if there's one thing that you think you know, you would, you would like to see happen this year for the CX community overall. Back to your comments about mentoring and the fact we're a community, or even for yourself, and maybe, what are you doing about it to kind of help it to occur? You know? What would that be? And we'll start with you, Michael, and then Curtis, and then end with Tabla

Michael Hinshaw

just, I'm just going to pick one aspect of this that Curtis brought us specifically and Tabitha, I've seen you do this many times, which is that community piece of it, helping others is what we've learned helping others in this community. It does take a village, as they say, and I think that each of us has a role in that. So I personally have made a commitment, actually a couple of years ago, and and Tabitha you and Diane majors are both a part of this, where I'm actively listening to, reaching out, reaching out to and inserting myself into the community more broadly, so that I can basically help others with the little bits of knowledge that I've gained, although far more often I learned from The people I'm talking to rather, rather than helping them or both, right? So, active, active involvement, I think, in in the careers and life paths of others is my 2026, priority.

Curtis Kopf



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Curtis, yeah, I, I think really well said, Michael, I'll say, like, look, Graham, you touched on this earlier. We're in a time of a lot of volatility in the world and in our businesses. So, so maybe I'll just say, you know, for for all of you in the CX world, be kind to yourselves. Give yourselves grace. You know, business conditions are challenging in many, in many areas, help each other out. I think is really critical. I think my wish in a year is just more look. I believe the only true strategy for any company is customer centricity. I actually don't think ultimately it is separate from what organizations exist to do. And so I My hope is this community continues to show how we drive value for businesses by better serving customers. I think just personally my commitment, Graham referenced it at the beginning. I write a newsletter called in pursuit of the customer. I'm crazy. It's a pure joy. I just it's free. I want to, but I do feel, like so many people helped and taught me and shared with me, I feel an obligation, you know, to humbly share, you know, all the mistakes I've made and what I've learned. And then, Michael, it's your point. I try to mentor where I can and help people who I remember myself 1015, years ago, and I try to help people who were in that place I was in progress in their careers.

Tabatha Dunn

Absolutely, I am definitely a plus one with both of those. I would say that, you know, it's a tough year. It's not just that. A lot of volatility is out there. There's a lot of people that are seeking their next opportunity, trying to figure out what that looks like, or they're really struggling for you know, what's the right relevance that I have here in my my career, in the company that I'm at? How do I really take my my team and my function to the next level and being helpful to our business and to our customers. So there's two things that I'm doing. One is, as a job seeker myself, like I'm helping and advising a lot of people. I'm like, you know, where, where are you struggling at and finding that next role? How do you figure out what that looks like? I get a lot of those questions right now. The second part of it is, I was just talking to Greg. And Gabe at cxxpa, and they've asked me, if I build a graduate level class on how to build your CX strategy or rebuild it. That's both content, but also like hands on advice for me, like, how do you build it for the company and the time that you're in right now? How do you build it? How do you get success with it. How do you build it into the way your business runs so that you have more traction and more ability to get the right



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resources, the right attention, the right engagement, right prioritization. So it's going to be a fun project to be able to do that, and so keep an eye out for that later this year.

Graham Clark

Be fantastic. My personal one, by the way, as you mentioned, CSPA, it feels to me like there's a lot of CX organizations spinning around. You've got the institute, Customer Experience Management, you've got journey management, you've got cspa. My favorite hope is that a year from now, we found a way to bring those together, because I think CX has a lot of challenges and and we'd be a heck of a lot more powerful together as a movement than we are independent. I know there's all the personal you know benefits of driving your own little initiative before it, or your own large initiative, but to me, feels to me like we need to find a way to bring that into an organization so fantastic it is. It's been a real pleasure to have you here. Curtis and Tabitha and Michael. Anybody wants more information on experience operating systems? Contact me. We'll send you a bunch of stuff and why they're important. But this is, this has been really, a really awesome way to start 2026 so here's to a fantastic year and getting a lot done, both personally and in the CS profession globally. That's great.

Tabatha Dunn

Thanks so much. Thank you. Thank you for having us all right here. Everyone Bye, for

Curtis Kopf

now. Thank you. Good luck. Everyone be well. Bye.