

Back-to-Business Fall 2025

Strategic Checklist for CX Directors



Reignite Agent Engagement

- ☐ Equip supervisors with real-time coaching tools (whisper, flash messages)
- ☐ Use AI alerts to support performance — not control it
- ☐ Shift KPIs from speed to quality and customer impact



Turn Data Into Operational Clarity

- ☐ Ensure all roles share a 360° customer view
- ☐ Use real-time dashboards to monitor SLAs and adjust proactively
- ☐ Transform reporting into continuous improvement cycles



Redesign Automation with the Human in Mind

- ☐ Identify friction-heavy journeys to automate without breaking empathy
- ☐ Deploy AI to assist agents with suggestions, not decisions
- ☐ Track outcomes like resolution rates and CSAT post-automation



Strengthen Internal Cohesion

- ☐ Break down silos with unified platforms for voice, messaging, and CRM
- ☐ Visualize team availability with presence and activity statuses
- ☐ Reinforce rituals like daily stand-ups or weekly retros to align teams



Deliver Seamless Omnichannel Experiences

- ☐ Centralize email, voice, messaging in one interface
- ☐ Personalize every interaction through CRM-driven insights
- ☐ Continuously optimize journey handoffs across channels

