

Transform Your Customer Experience with AI Strategy to Success

Chris Carter



About Me

Enterprise AI & Customer Experience (CX)

- Global Account Director, Head of Enterprise Architecture
- Over two decades of experience in AI-driven customer transformations
- Passionate about bridging technology with business strategy

Brands I've Helped Drive Success For

- Disney, Starbucks, Sony, Verizon, AT&T, Bank of America, Truist, etc.
- Love working with SMBs

Fun Fact About Me

I built a personal AI finance assistant on my Mac using N8N and Browser-Use to pull my bank transactions weekly, store them in a local PostgreSQL database, create visualizations with Metabase, and then integrate with ChatGPT to generate weekly spending summaries



Tools & Influencers

Generative AI

- **ChatGPT-4o**: LLM
- **Adobe Firefly**: Image and video
- **Claude + Cursor**: Coding
- **ElevenLabs**: Voice cloning
- **Suno**: Music creation

Automation

- **Zapier**: Beginners, but powerful
- **N8N**: Local, open-source
- **Browser-Use**: Local, client-browser agent

People

- **Shelly Palmer**: Business tech, AI focused
- **Sabrina Ramonov**: Deep in the weeds

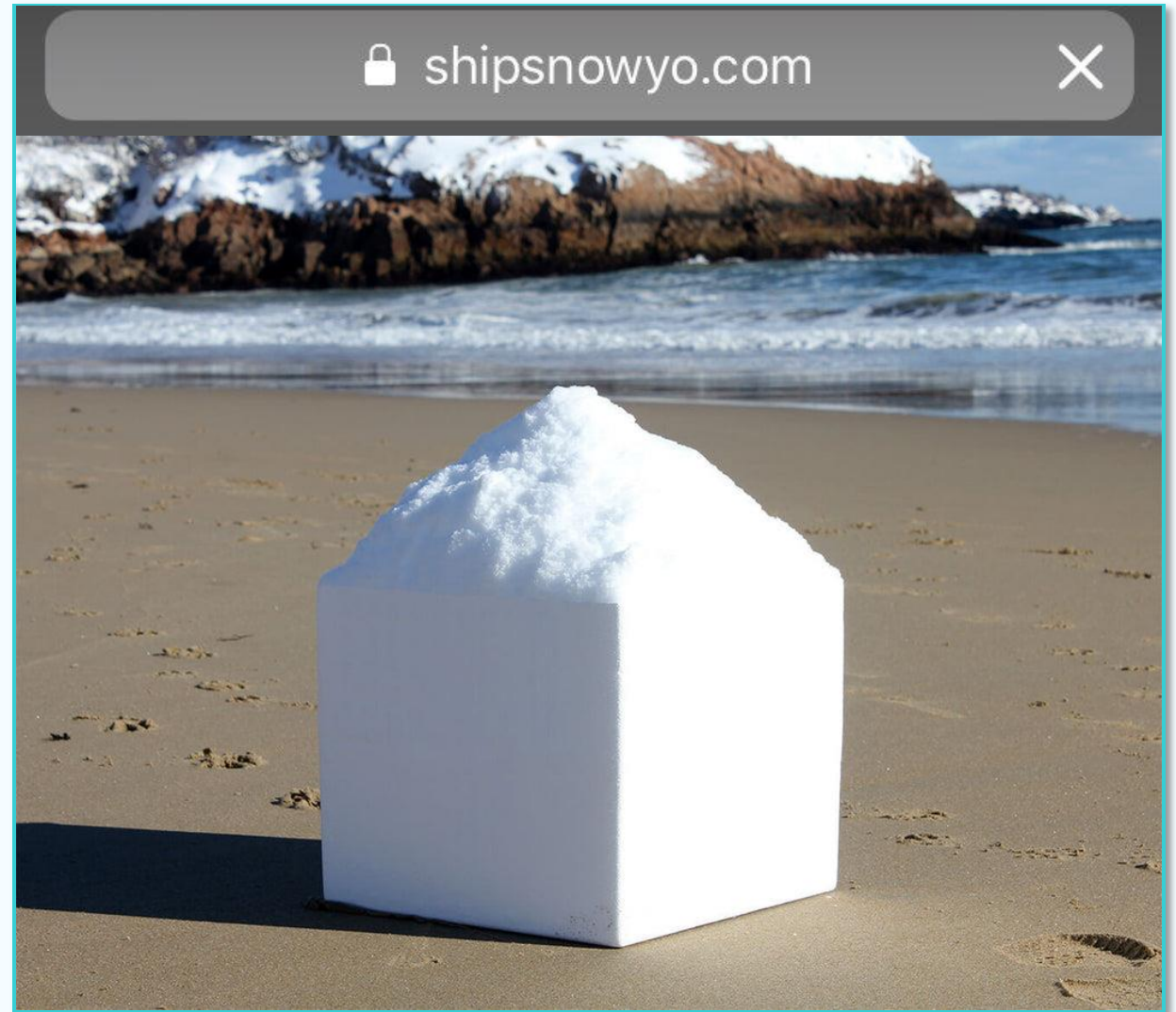
Newsletters

- **TLDR Newsletter**: <https://tldr.tech/>
- **The Rundown AI**: <https://www.therundown.ai/>

Ship Snow?

- Refine business ideas
- Create social content
- Create product images
- Customer chat
- Create the app code

FAIL FASTER



Agenda

- 01 AI in Customer Experience** (10 mins)
- 02 Identifying AI Opportunities** (10 mins)
- 03 Prioritization Framework** (10 mins)
- 04 Closing and Q&A** (5 mins)

Agenda

01 AI in Customer Experience (10 mins)

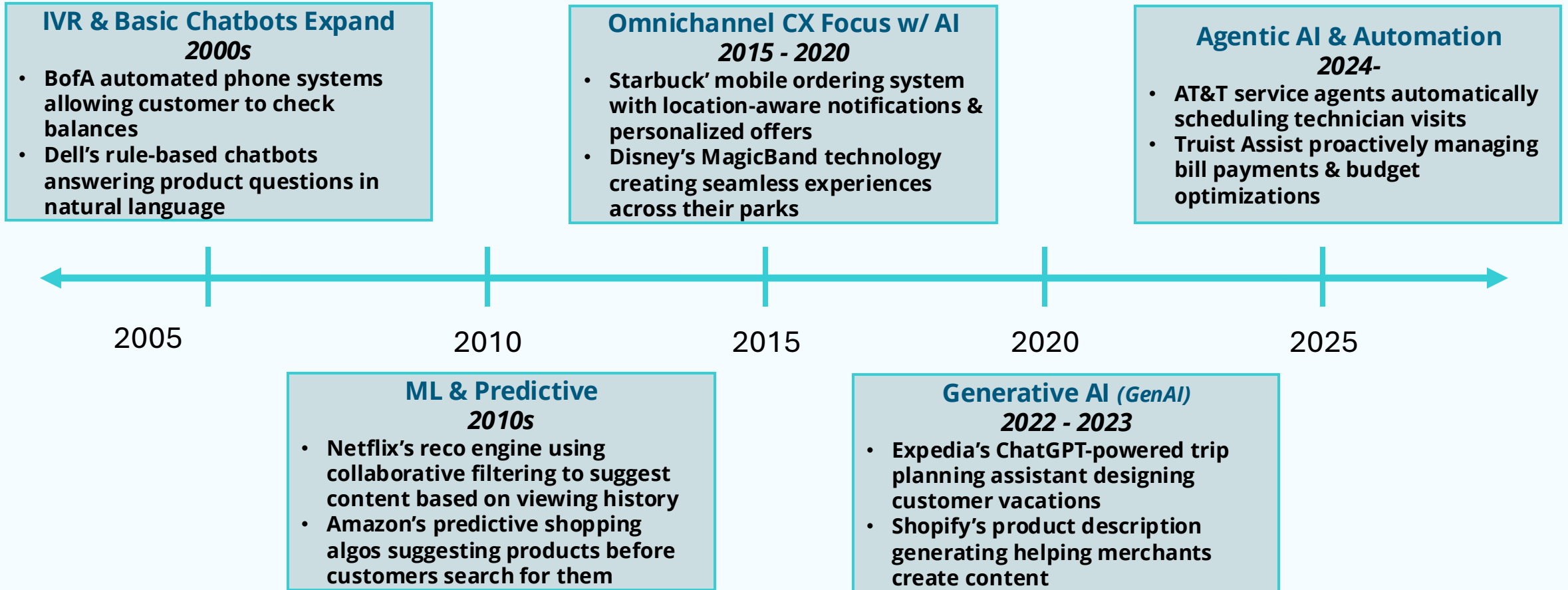
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AI in Customer Experience is Not New

AI in CX is Not New—but it's Been Limited

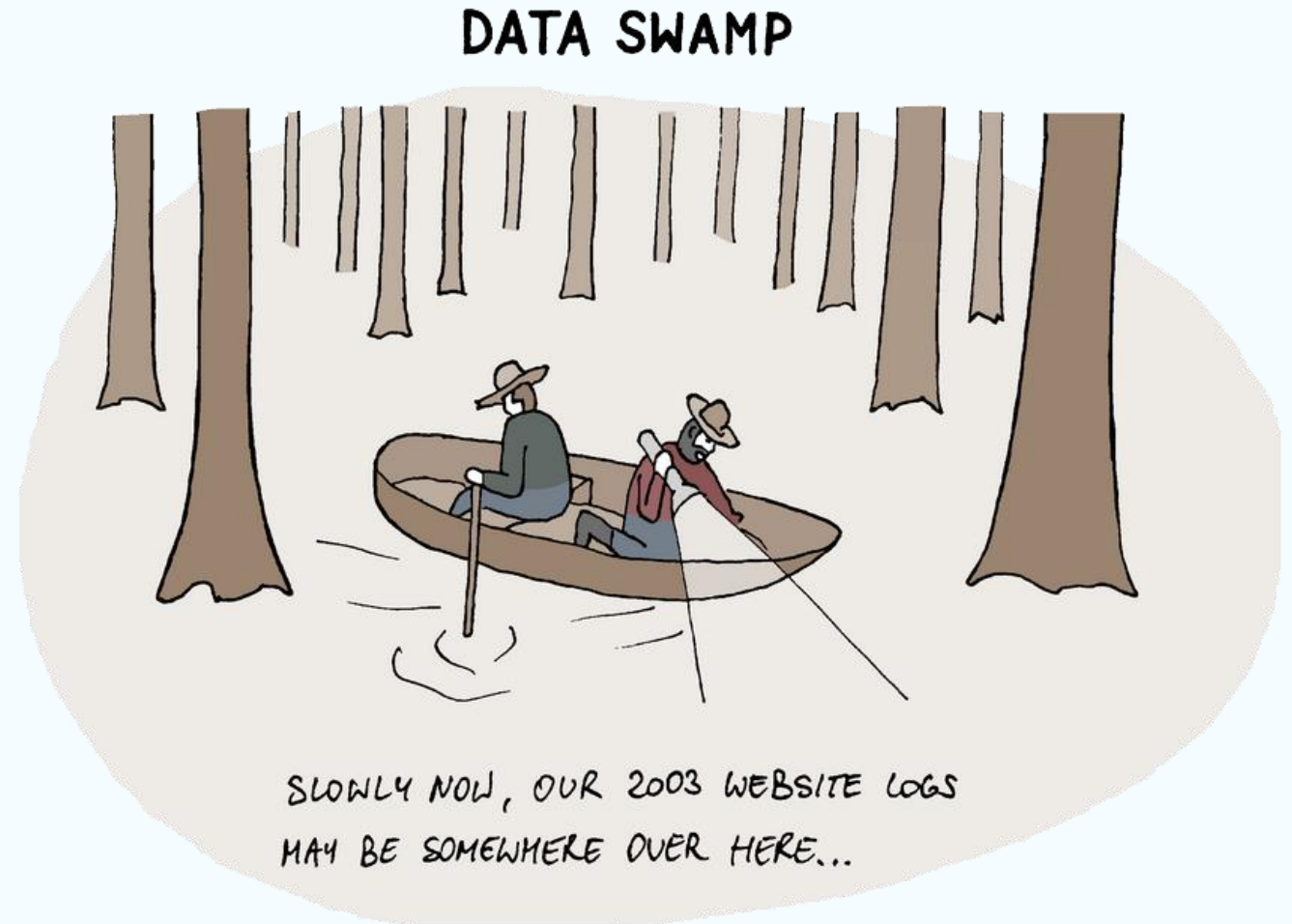


The Data Swamp Problem

The Data is There—but we Can't Use it

- Vast amounts of customer data
- Data was siloed, inconsistent, or too complex to use effectively
- Lightly used for surface-level use cases (static recommendations, simple automation)

We just couldn't make structure from all the unstructured data



GenAI Unlocking Data

Generative AI Breaks the Limitations

Traditional AI

- **Task-Specific:** Performs predefined tasks using explicit rules & algorithms
 - *AMEX predefined rules for fraud*
- **Data Bottlenecks:** Requires structured, labeled datasets for training
 - *Inventory mgmt requiring UPC & struggle with irregular product descriptions*
- **Predictive but Not Creative:** Good at analysis & classification but lacks content generation
 - *Bank scoring models predict risk but not able to give advice*

Generative AI

- **Works with Unstructured Data:** Can leverage vast, messy datasets (e.g., text, images, audio, etc.)
 - *BloombergGPT trained on financial documents, earnings calls transcripts, & news to generate investment insights*
- **Dynamic & Creative:** Generates new content rather than just analyzing existing data
 - *Coca-Cola launched their "Create Real Magic" campaign using GenAI to enable customers to create personalized ads*
- **Contextually Aware:** Uses deep learning & neural networks for nuanced understanding
 - *Arthropathic & Cursor partner enabling the IDE to generate code based on context of the application*

Generative AI unlocked the data being collected for the last two decades

The Future of AI in CX

Are you Ready?

A Look at Meta

- Over last year market cap grew 29%
- Market cap of \$1.69T
- Magnificent Seven
- Recent announcement of 5% layoffs
- Continuing to hire machine-learning engineers

What Does This Indicate

- AI isn't replacing jobs, it's reshaping them
- Those who understand & leverage AI will be in demand
- AI is not just a trend—it's a fundamental shift in how businesses operate

Chris' Prediction

- AI will expedite the maturity to a holistic view understanding of the customer, changing AI from a single-purpose tool to an interconnected system that share insights & shape CX

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The AI Opportunity Mindset

AI is a tool, Not a Magic Solution

- Thousands of AI applications with a list that is continually growing
- Constant change in top ranked tools, today ChatGPT tomorrow Deepseek
- Overwhelming to keep up!

Start with AI Opportunity Mindset

- AI doesn't create opportunities—it enhances them
- Don't start by looking for "where can I use AI" but instead ask "where can I remove friction and scale"
- Great leaders will continually shine, why?
 - They always look for ways to do things better
 - They think strategically about the goal before investing in ideas or change
 - They take calculated risks based on impact and effort
 - They understand what drives their business

Applying the AI Mindset

Putting it into Practice

Start with a purpose!



Goal: Identify parts of your business where your return per hour is lowest, tasks are repetitive, & generally these are tasks no one enjoys

Understand your business:

- **Operations:** Core competency, creates the value
- **Sales & Marketing:** Expands the value
- **Finance:** Confirms value growth
- **Support teams:** Customer Support, HR, IT, Legal, etc.

Common AI Entry Points

Practical Starting Places in Each Business Function

Operations

- **Process Automation:** Disney's MagicBand technology & mobile app for seamless park operations
- **Quality Control:** AT&T proactive network monitoring & technician scheduling

Marketing

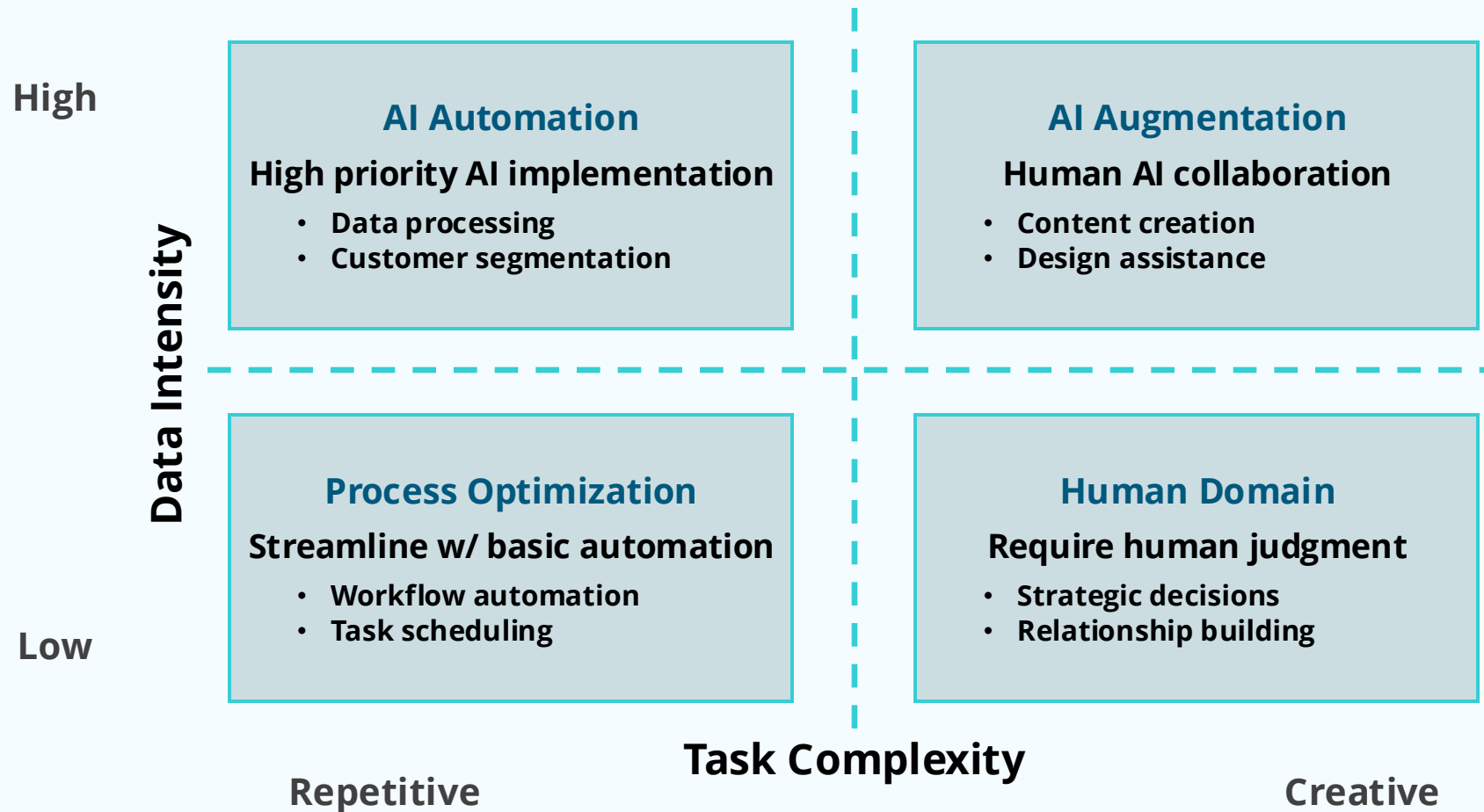
- **Personalization Engines:** T-Mobile entire homepage personalization
- **Campaign Optimization:** Verizon real-time offer adjustments

Sales

- **Lead Scoring:** SiriusXM B2B lead scoring & churn prediction

From Mindset to Framework

Applying a Systematic Structure



Focus AI implementation efforts on the top-left quadrant first

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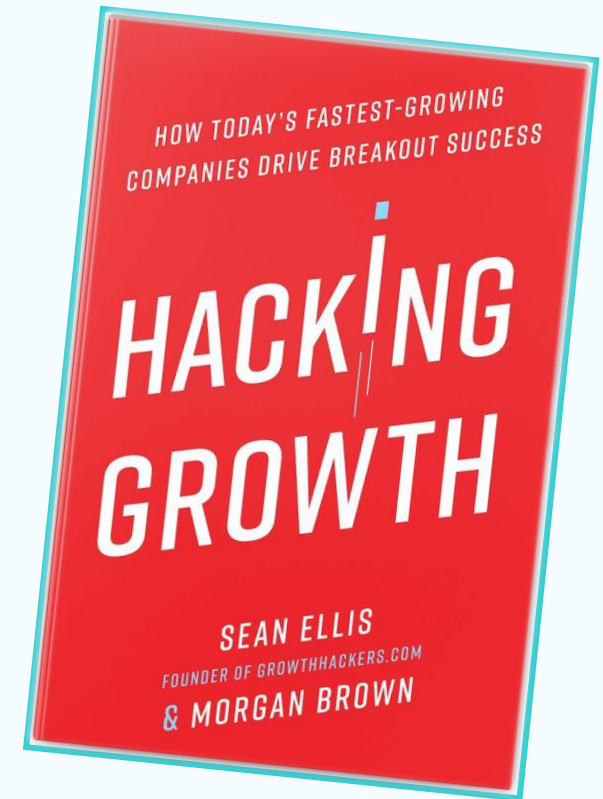
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The ICE-AI Prioritization Framework

Selecting High Impact AI Initiatives with Confidence

Traditional ICE Framework expanded for AI application

- **Impact:** The potential business value (e.g., cost saving, revenue increase, etc.)
- **Confidence:** Certainty of success based on available data & technical feasibility
- **Ease:** Implementation difficulty considering resources, technical complexity, & integrations
- **AI Readiness:** Added dimension specific for AI Initiatives



Scoring Your AI Opportunities

Quantifying Potential Value & Feasibility

Impact (1-10)

- **10:** Transformative to the business
- **5:** Significant improvements to a specific function
- **1:** Minimal improvement to existing processes

Confidence (1-10)

- **10:** Proven solution with numerous successful implementations
- **5:** Known technology with some implementation success
- **1:** Experimental approach with unclear outcomes

Ease (1-10)

- **10:** Quick implementation, minimal resource, no integration issues
- **5:** Moderate timeline, reasonable resource requirements
- **1:** Complex implementation, significant resources needed

AI Readiness (1-10)

- **10:** All necessary data available, high quality, easily accessible
- **5:** Some data available but gaps exist or quality issues
- **1:** Little to no relevant data, significant data preparation needed

From Scores to Decisions

Prioritizing Your AI Roadmap

Formula

- **Priority scoring** = (Impact x Confidence x Ease x AI Readiness) / 1000

Score Interpretation

- **8-10**: Immediate implementation
- **4-7**: Near-term consideration
- **2-3**: Medium-term planning
- **0**: Long-term vision or reconsider

Example Calculation

- **Customer churn prediction:**
 - Impact: **8**; Confidence: **7**; Ease: **5**; AI Readiness: **6**
 - Score: $(8 \times 7 \times 5 \times 6) / 1000 = 1.68$
 - Decision: **Medium-term planning**

AI Initiative Requirements Checklist

Setting the Foundation for Measurable Success

1. Predefined Success Metrics

- Clear lead indicators identified before implementation
- Specific measurable KPI tied to either
 - Revenue generations (e.g., sales lift, conversion improvements, etc.)
 - Efficiency gains (e.g., time savings, resource optimization, etc.)
- Baseline measurement established for comparison

2. Committed Measurement Timeline

- Defined evaluation periods (e.g., 30, 60, 90 days)
- Milestone check-ins scheduled
- Go/no-go decision points predetermined

3. Measurement Infrastructure

- Dashboard created & tested prior to deployment
- Real-time monitoring capabilities
- Reporting cadence & ownership determined

4. Accountability Framework

- RACI filled out
- Documented action plan for both success & failure

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Your AI-Powered CX Journey Starts Now

From Strategy to Success

- **Focus on business problems**, not AI tools—tools will constantly change
- **GenAI unlocks** what use to be unusable data, think big—identify data, remove friction
- **Prioritize wisely** with ICE-AI Framework: Impact x Confidence x Ease x AI Readiness
- Have a **clear goal & KPI** that measures success
- **Don't sell snow!**



**Don't just use AI to fail faster—
use it to accelerate what works**

Let's Connect:

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Thank You

