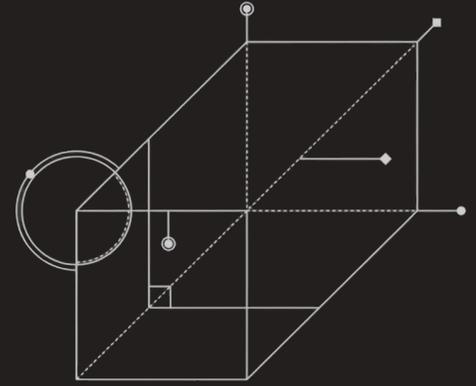


THE CX INTELLIGENCE READINESS CHECKLIST

Use this quick self-assessment to evaluate whether your CX operation can see clearly, diagnose what matters, and act decisively with intelligence.



Customer Understanding

- We know why customers are calling back – not just how fast we answered.
- We can track escalation patterns across channels, not just individual conversations.
- We've mapped customer effort across the full journey (not just CSAT post-call).



QA + Performance Visibility

- We evaluate 100% of agent interactions.
- We measure both human and AI performance – side-by-side.
- Our QA results connect directly to coaching and workflow improvements.



Automation Strategy

- Our AI agents and chatbots are trained using real customer behavior data.
- We know where self-service fails and how fix it immediately.
- Automation is aligned with actual workflows, not assumptions.



Operational Insight

- We can trace operational problems back to their root causes.
- Our reporting connects data from all customer-facing and back-office systems.
- We receive early warning signals before issues affect customers.



Leadership Confidence

- We act on real-time and predictive intelligence, not just lagging reports.
- Leaders ask strategic questions and get actionable answers without delay.
- We have a clear line of sight between performance, customer experience, and business outcomes.

If you checked fewer than 10 boxes –
your CX operation may be running on guesswork.



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