

# CX Reality Check

## Is Your AI Driving Impact or Just Efficiency?

*Instructions: Go through the three sections for a quick self-assessment. Review each statement and select the ones that apply to your organization.*

**1 “tick” equals 1 point. You can have multiple answers.**

### Are you channel- or customer-first?

- Our agents see CRM, order, payment, and service data in one unified interface.
- Customers can switch channels (e.g., phone → WhatsApp → email) without losing context.
- Routing decisions are based on full customer history, not just channel.
- Product, contract, and logistics data are accessible in real time.
- We measure resolution quality, not just response time.

### Are you just responding or truly listening?

- We systematically monitor public conversations beyond direct mentions.
- We cluster topics across channels (social, care, reviews, surveys).
- We identify recurring themes and emerging trends.
- Insights are shared with product, marketing, and leadership teams.
- We prioritize topics based on business impact, not volume alone

### Is AI replacing people or empowering them?

- AI handles standardized, recurring requests.
- Clear escalation logic exists for emotional or complex cases.
- Human agents review and improve AI responses regularly.
- AI performance is part of ongoing quality management.
- We measure resolution and trust, not just automation rates.

*Count the number of “ticks” and go to the next page for interpretation.*

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*Instructions: Take your score from the previous page and find the correct data range it falls in. Example: if your score is 10, your organization is organizationally strong, but structurally limited.*

### 12-15: Integrated & Impact-Driven

AI, data, and people operate as a system. You are likely creating both efficiency and strategic insight.

### 7-11: Operationally strong, structurally limited

You have important elements in place, but silos or unclear ownership may be limiting full impact.

### 0-6: Efficiency without systemic impact

Tools may exist, but without integration, signal intelligence, and hybrid governance, transformation remains fragile.

## Want to know more about impactful CX?

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**Raffish**