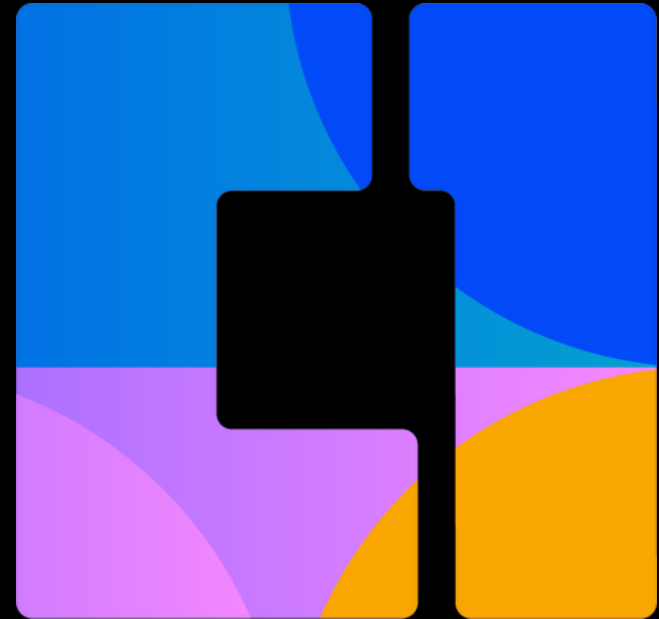


From AI Talk to Traction

Turning CX Ambition into Measurable Business Value



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High adoption. Low value. Wrong starting point.

 starts with the journey, aligns the technology, and proves value in 90 days



THE PROBLEM

AI is everywhere. Enterprise value is vastly unproven

88%

of organizations report regular AI use in at least one business function.

95%

of enterprise GenAI pilots show no measurable P&L impact.

>40%

of agentic AI projects may be canceled by 2027 due to cost, unclear value or weak risk controls.

THE NEED - Translating AI into production workflows that customers trust and executives can measure



Sources:

- McKinsey, The State of AI in 2025, Nov. 2025: 88% regular AI use and approximately one-third scaling AI programs.
- MIT NANDA, The GenAI Divide: State of AI in Business 2025, July 2025: analysis of 300+ AI initiatives and 95% no measurable P&L impact framing.
- Gartner press release, June 25, 2025: >40% of agentic AI projects canceled by end of 2027 due to escalating costs, unclear business value or inadequate risk controls.

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AI is outpacing operating models

Cost pressure

Agentic workflows can become expensive when orchestration, integration and exception handling are underestimated.

Risk controls

Access, identity, PII, consent, human-in-the-loop and logging are now first-class design requirements.

Trust erosion

Premature self-service can reduce customer trust when it blocks resolution or hides escalation.

Vendor sprawl

Every platform wants to be the center of the stack; customers still need one operating model.

IMPLICATION - the winning motion is not "AI everywhere." It is governed orchestration around one measurable journey.



STARTING POINT

Different paths. One operating layer



THE TRUTH

Activity metrics vs business metrics

VENDOR HEADLINE

"Deflected" or "Contained"

The contact never reached a human. That says little about whether the task was completed or demand disappeared.

GROUNDING TRUTH

Resolved

Customer Succeeded. The task was completed for eligible demand, without avoidable repeat contact, escalation confusion or hidden rework.

14%

of issues fully resolve through traditional self-service, according to Gartner as cited by Lorikeet.

\$1.84 vs \$13.50

cost benchmark: self-service vs assisted contact.

1/3

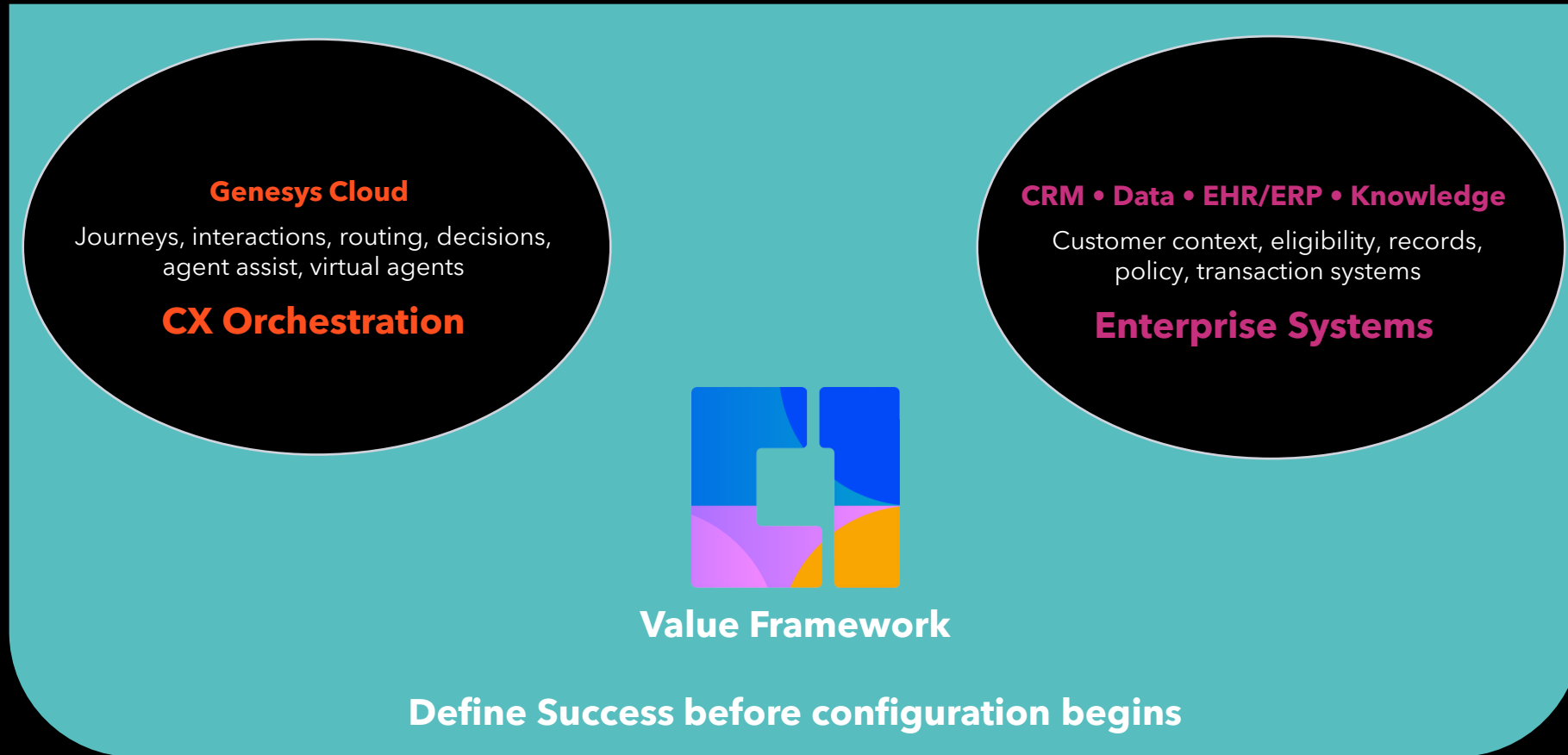
of brands may erode CX through premature AI self-service in 2026.

11.3%

AI-resolved recontact rate benchmark cited vs 8.7% human-resolved.



Value depends on coordinated execution



Use Case Example

Outpatient No Shows

STARTING AMBITION

"We want to improve outpatient efficiency."

GET SPECIFIC

U.S. outpatient no-show rate averages ~17% nationally; each miss costs ~\$196 and the system absorbs \$150B+ per year.

SUCCESS

Move this site from the ~17% national average toward the single digits top-decile reminder programs report.

WHY THE GAP

Patients are confused by prep instructions and can't arrange a required ride home.

EXPERIMENT

Pilot a structured protocol on one procedure type: plain language instructions, a 48-hour reminder, a ride home confirmation call.

TEST / ADJUST

Prep cancellations drop, but far-out bookings still slip – add a 7-day reminder with a checklist.

SCALE

Roll the full protocol to all procedure types requiring prep or sedation; track the metric monthly.

Target range: +11% attendance on average; top telephone reminder programs cut non-attendance up to ~50%



C1 VALUE FRAMEWORK

Define & Understand

Set the outcome, then diagnose the current reality before prescribing change.

01

Outcome

What must become materially different?
Reduce avoidable no-shows and same day cancellations

Impact: More completed procedures

Who Benefits: Patients, scheduling & care teams, clinic operations

Evidence: Attendance improves, rebooking and wasted capacity decline

02

Diagnose

What is true vs. assumed?
Identify root cause

Reality: Likely drivers; prep confusion & transportation gaps

Mapping: Journeys, systems, handoffs, and ownership

Evidence: Baseline missed or cancelled procedures

RESULT: One measurable outcome and one fact-based diagnosis before prescribing change



C1 VALUE FRAMEWORK

Design, Decide & Execute

Turn the operating model into action with clear choices and disciplined delivery.

03

Design

What operating model produces the outcome?
Build the workflow

Process: Prep, remind, confirm, escalate

Ownership: Clear roles and decision rights

Technology: Connect data, automation, and controls

04

Decide

What will be configured, integrated, automated, built, retired, or left alone?
Identify what changes, what stays

Configure: Reminders, cadence, routing, escalation

Integrate: Scheduling, patient data, transportation, communications

Keep: Existing system of record remains authoritative

05

Execute

How will work stay accountable?
Move to accountable delivery.

Sequence: Trial, validate, adjust, expand

Ownership: Clear owners, actions, checkpoints

Control: Reduce risk before scaling

OUTCOME TARGETS: -8 pts no-show rate | +12% Completed appointments | -15% Manual outreach | +6% Revenue impact



Transfer & Measure

Create independence, then prove whether operating capacity actually changed

06

Transfer

Who can operate it without the advisor?
Make the organization self-sufficient

Ownership: Clinic operations own workflow, exceptions, and monitoring

Capability: Define roles, decisions, and exceptions

Outcome: Operate without outside dependency

07

Measure

Did the operating capacity actually change?
Prove change delivered value

Track: Attendance, quality, risk, rebooking, capacity

Compare: Actual vs baseline and target

Decide: Scale, adjust, or stop

RESULT: One measurable outcome and one fact-based diagnosis before prescribing change



EXAMPLES

Use Case Example

Customer Churn

STARTING AMBITION

"We want to improve customer retention."

GET SPECIFIC

Customers who don't use the product in their first 14 days churn at 3x the rate of everyone else.

SUCCESS

Reduce 90-day churn among new signups from 22% to 15% within one quarter – a number, a segment, a deadline.

WHY THE GAP

Usage data + churned-customer interviews: most never finished onboarding setup. It felt confusing to start, not that the product was bad.

EXPERIMENT

Add one guided setup checklist for new users in a 20% signup cohort; leave the other 80% as a control group.

TEST / ADJUST

Checklist group hits 30% higher setup completion – but churn barely moves. Users finish the checklist and still miss the 'aha moment' feature. Add an in-app nudge pointing there.

SCALE

Roll checklist + nudge out to 100% of new signups; track 90-day churn monthly to confirm it holds at full volume.

Result: 90-day churn fell from 22% to 16% in the test group



EXAMPLES

Use Case Library Examples



BUILD TRACTION

Start now. Prove one journey in the next 90 days

1

Weeks 1-2
Evidence + Readiness

Select one journey; confirm eligible demand, baseline, target, owners and dependencies.

2

Weeks 3-8
Configure + Test

Configure Genesys, connect actions, test exceptions, validate controls and prepare users.

3

Weeks 9-12
Launch & Decide

Expose a controlled segment; compare results and issue scale, adjust or stop decision.

LET'S TURN AI AMBITION INTO MEASURABLE TRACTION





THANK YOU