

Market Study:

State of Generative AI

MARCH 2024

State of Generative AI

When it comes to customer contact technology, the innovation wheel is always spinning. New features and solutions are constantly emerging with the promise of uncovering better data, unlocking new efficiencies, and unveiling superior experiences.

Every once in a while, however, a more transformative technology emerges. Rather than simply representing a solution for *optimizing* existing performance, such a technology drives leaders to reconsider the very way they think about customer contact.

In the eyes of many contact center leaders, business executives, and technology aficionados, generative AI falls into this gamechanging category of solution. Not simply a way to *automate* rote contact center processes, generative AI promises the opportunity to *elevate* nearly every facet of customer contact. From strengthening self-service, to fostering personalization, to streamlining operations, to elevating agent experiences, generative AI may change the way leaders approach many longstanding contact center tasks, challenges, and objectives.

Granted, enthusiasm is rarely lacking within the contact center community. What is more elusive, however, is a certain pathway to results. And as the generative AI hype continues to grow, savvy leaders will seek more concrete direction on which use cases to pursue, which strategies to rethink, and which outcomes to measure.

The product of CCW Digital's in-depth research into the state of generative AI, this market study provides the answers. It reveals how contact center leaders are approaching their generative AI investments, which self-service and employee experience objectives are most crucial, what risk factors warrant serious consideration, and how contact center strategy must transform to account for an AI-driven future.

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Methodology & Demographics

To assess the state of generative AI, CCW Digital conducted a comprehensive survey in March 2024. Directed at those responsible for their organizations' contact center, customer experience, operations, and/or marketing functions, the survey uncovered leaders' thoughts, concerns, and visions regarding generative AI initiatives.

Example respondent job titles included customer service director, director of customer experience, senior director of customer care, vice president of marketing, head of client care, senior vice president of contact center, vice president of customer engagement, senior director of customer success, vice president of operations, vice president of customer success, vice president of client solutions, and associate vice president of customer service.

Respondents represented companies of all size ranges and most major industries.

About the Author



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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology, and employee engagement research initiatives for CCW. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars, and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

Key Findings

- 1 There is no shortage of optimism regarding the transformative potential of generative AI. 81% of contact center leaders expect the technology to make a meaningful impact.
- 2 Befitting that optimism, 86% have plans for generative AI investments. More than half are meaningfully acting on those plans this year.
- 3 As they pursue solutions, “ease of implementation” represents the top investment consideration. Other high-ranking priorities include the user experience, impact on customer experience, technology costs, and risk factors.
- 4 When it comes to potential risks, data safeguarding represents a particularly growing concern. Wariness over inaccurate or inconsistent communication, a loss of human-centric CX, and customer manipulation is also on the rise.
- 5 The overwhelming majority of leaders believe self-service needs to be more personalized and more resolute. Fortunately, 70% are confident generative AI can help achieve these objectives.
- 6 Leaders are specifically confident in generative AI’s ability to foster self-service that is more contextually relevant and more capable of acting based on customer data.
- 7 Although they feel it has clear benefits for the agent experience, contact center leaders are keenly aware of employee reservations. The majority acknowledge that agents are worried about potential job loss, a reduction in the human touch, learning curves associated with new solutions, and the adverse impact AI may have on customer sentiment (and thus the tone of conversations with these customers).
- 8 Once they alleviate these concerns, leaders can leverage generative AI to address long-standing pain points. The biggest sources of agent effort and frustration include looking up answers to customers’ questions, accessing or updating knowledge bases, accessing information about customers and their past interactions, and getting internal support.
- 9 With these focuses in mind, key agent-facing investment priorities include AI for knowledge management, real-time assistance and guidance, call recording and note-taking, and real-time customer data.
- 10 Cognizant of a potential scenario in which “AI handles simple issues so agents can focus on complex ones,” the majority of contact center leaders recognize the need to rethink hiring and training, performance management, and compensation.



State of Generative AI: All Talk or All-In?

Headlines about generative AI's transformative potential are unavoidable, but is *actual enthusiasm* over the technology undeniable? Are contact center leaders certain that generative AI is their pathway to happier agents and customers? More importantly, are they putting investment dollars behind that optimism?

The answers to these questions generally lean in the affirmative direction. Leaders indeed have faith that generative AI can meaningfully transform key aspects of the customer contact function, and they are beginning to implement the technology within their operations.

A whopping 81% of contact center leaders believe generative AI will make an impact, with 35% confident it will live up to the loftiest of hype. Only 6%, meanwhile, fear generative AI will have little-to-no effect on the customer contact function.

Given the ample optimism, it should come as no surprise that most contact center leaders are seriously evaluating – if not pursuing – generative AI initiatives in 2024. A non-trivial 15% say they are already eagerly investing in the technology, while 36% are taking action on select use cases and beginning to assess performance.

A similar 36% of contact center leaders are primarily (though confidently) in the planning phase, while only 14% are still refraining from boarding the generative AI train.

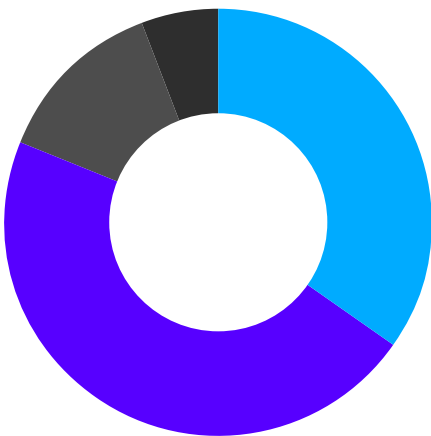
With 86% confirming their *legitimate interest*, generative AI solutions will get a fair shake in 2024. They are receiving buy-in across the customer contact community and thus will have the opportunity to demonstrate some results.

What might those initial results entail? The customer contact community is divided on this question, with 56% anticipating a clearer impact on *efficiency* and 44% eyeing an impact on *efficacy*.

Granted, if generative AI is to live up to the hype, then it will deliver results on both fronts. By helping brands intelligently automate cumbersome tasks and more quickly zero-in on customer and employee needs, generative AI solutions should absolutely improve operational efficiency. And by fostering more personalized self-service and more consultative agent support, the solutions should also lead to higher-caliber experiences.

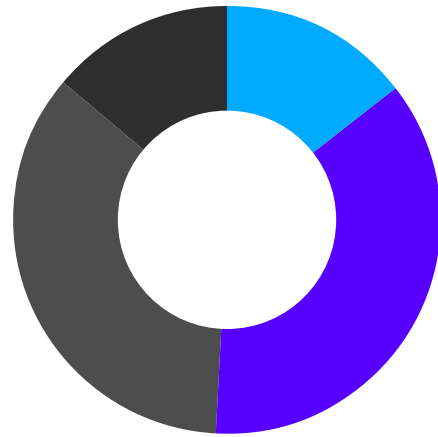
To experience this dual-faceted success, brands will have to establish the right objectives, identify the right use cases, develop complementary strategies, and mitigate potential risk factors. Without carefully considering each phase of their AI journeys, brands will not simply squander their opportunity to achieve *both* goals. Instead, they will struggle to achieve *either* type of return on their investments.

Which best describes your company's optimism regarding the potential impact of generative AI?



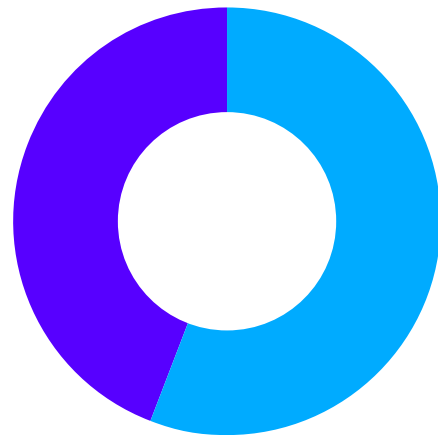
- **34.85%** Very optimistic - it will be a true game changer for the contact center/CX function
- **46.46%** Cautiously optimistic - it may not dramatically transform everything, but it will make a clear impact
- **13.13%** Somewhat pessimistic - it may impact some parts of the operation, but it definitely won't live up to the hype
- **5.56%** Very pessimistic - do not expect it to have a meaningful impact

Which best describes how your contact center/CX team is approaching generative AI initiatives in 2024?



- **14.65%** High commitment: We're actively investing, and we are holding the tech accountable for real ROI
- **36.36%** Plans: We're definitely investing in select use cases, and beginning/will begin to monitor impact/results
- **35.35%** Early plans: We might make some investments, but we're primarily focused on evaluating the tech & use cases
- **13.64%** No plans: at most, we're lightly evaluating the technology

By the end of 2024, do you expect your generative AI solutions will have had a bigger impact on efficiency or experience quality?



- **56.06%** Cost/efficiency
- **43.94%** Experience quality/satisfaction



Generative AI Risks and Considerations: Are Brands Ready to Invest Intelligently?

When it comes to investing in contact center technology, success is not simply about opening up the checkbook and taking action. It is about taking the *right* actions, prioritizing the most vital factors while thinking critically about what a new solution or initiative might mean for the overall operation.

When it comes to investing in generative AI, contact center leaders believe *degree of difficulty* is the most important consideration.

As they evaluate and pursue generative AI investments, nearly 93% of contact center leaders are focusing on ease of implementation. Nearly as many are prioritizing solutions with intuitive, user-friendly experiences. By prioritizing solutions that are easy to implement and use, contact center leaders are hoping to avoid the distractions and uncertainties that so notoriously thwart technology investments.

Aware that lengthy IT rollouts create costs, foster frustration, and delay progress, they want to pursue solutions that “just work.” They want to begin implementing generative AI right away so that they can focus on *perfecting* the technology instead of *preparing* it.

Hoping to quickly secure customer and employee adoption for their new AI tools, leaders will simultaneously prioritize interfaces that are intuitive, inviting, and rewarding. Users are known for resisting change, even if that change would prove beneficial in the long run. It is therefore imperative to deploy AI solutions that make a great first impression – and secure immediate user buy-in.

Other chief considerations impact on customer experience and sentiment (91%), cost (91%), and leading risk factors (90%).

No matter how proudly thought leaders trumpet the contact center as a “value center,” cost clearly still matters. Contact center leaders are not going to receive unlimited budgets for their generative AI investments, which means they will pursue solutions that offer the most immediate, demonstrable “bang for the buck.”

Cognizant of the need to compete on the customer experience, these leaders nonetheless refuse to let cost considerations undermine their ability to delight customers. They can neither select bargain bin solutions that will adversely impact experiences nor *overautomate* at the expense of productive interactions. The goal is to find solutions that make customers happier and more loyal.

Far from an old school automation solution, generative AI technology actively *advises* agents and *creates* customer-facing communication. This naturally introduces risk factors, and leaders are understandably considering those risks as they determine which solutions to deploy – and how aggressively to deploy them.

Though on the radar for many organizations, comparatively smaller investment considerations include the impact on employee headcount, the need for new employee skills, and the technology’s industry specificity.

In ranking the employee considerations at the bottom of the list, contact center leaders are potentially exposing short-sighted, contradictory thinking.

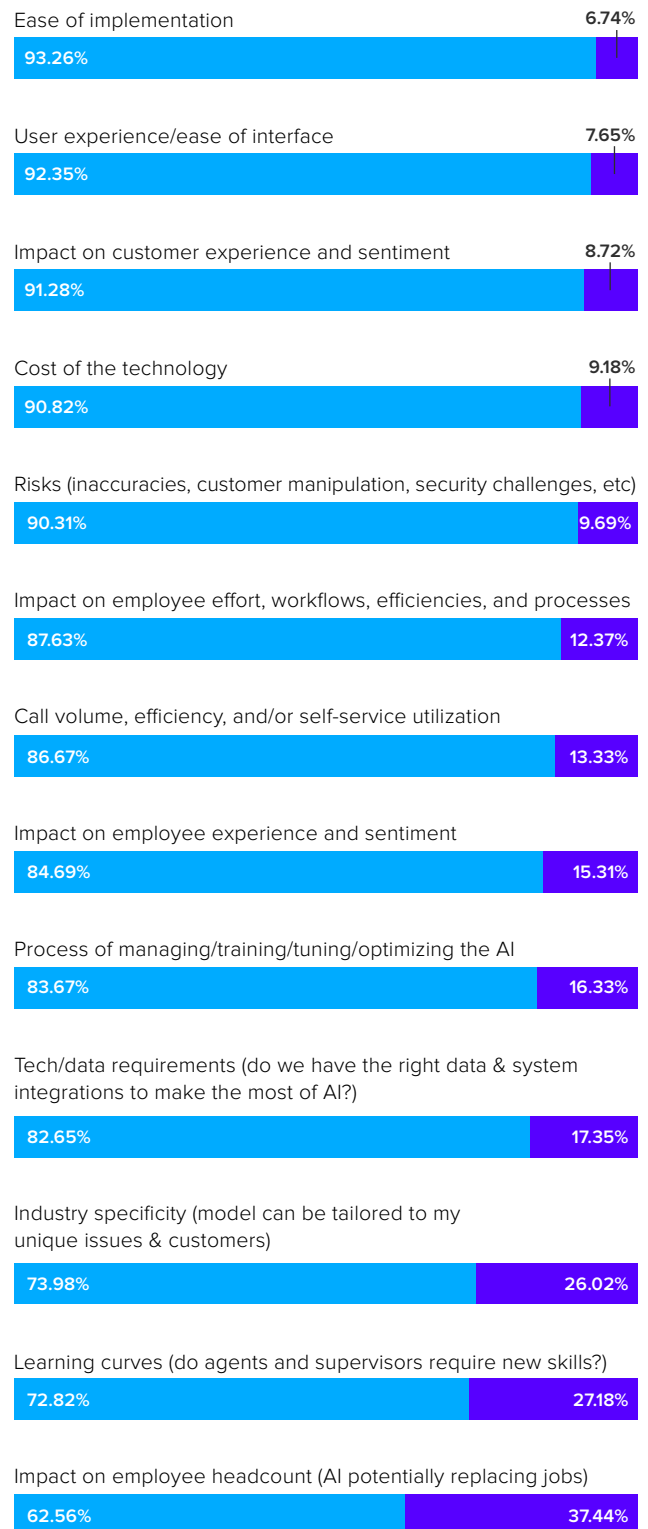
If a leader believes in the power of generative AI technology but does not believe it will spur job loss, then that leader subscribes to the notion that “AI will handle simple issues, enabling agents to focus on complex ones.” Agents and supervisors will, of course, require *new skills* to handle this higher-value work; previous CCW Digital research confirmed that only 16% of contact center leaders believe their agents already possess vital, next-generation competencies.

Leaders who are not worried about headcount should, therefore, be devoting *considerable attention* to upskilling their employees. Otherwise, they will shift staff to complex, consultative work for which they are not trained, resulting in inefficient, ineffective support experiences.

Given that many contact centers are in the early stages of their generative AI journeys, it is understandable that industry specificity is not a top priority right now. But if brands want their generative AI solutions to foster *highly personalized* and relevant customer interactions *without undue risk*, it will become critical to pursue industry-specific solutions sooner rather than later. Without assurance that the tool can work for their specific industry and customers, brands will only be able to automate a limited number of use cases.

Are these factors top-of-mind as you evaluate and implement generative AI solutions?

Yes No



ASSESSING GENERATIVE AI RISKS IN 2024

As generative AI was rising to prominence in 2022 and 2023, contact center leaders were identifying and debating many theoretical risks and hazards. As the technology matures and first-hand experience grows, leaders are gaining a better sense of which *potential risks* warrant the most *urgent attention*.

Specifically, they are becoming increasingly concerned about safeguarding customer data collected by their generative AI tools. A staggering 77% view data privacy and security as a bigger concern in 2024 than they did previously.

Whether by driving more relevant self-service or more consultative agent-led care, personalization is a major selling point of generative AI. Meeting a higher standard of personalization, of course, inherently requires the brand to collect and protect more data. Navigating emerging security challenges, compliance changes, and governance questions is therefore an increasingly essential part of a contact center's AI journey.

Other growing risk factors include generative AI's potential to communicate inaccurate information (74%), the fear that an overreliance on AI will reduce the human touch (70%), and the potential for customer manipulation (53%).

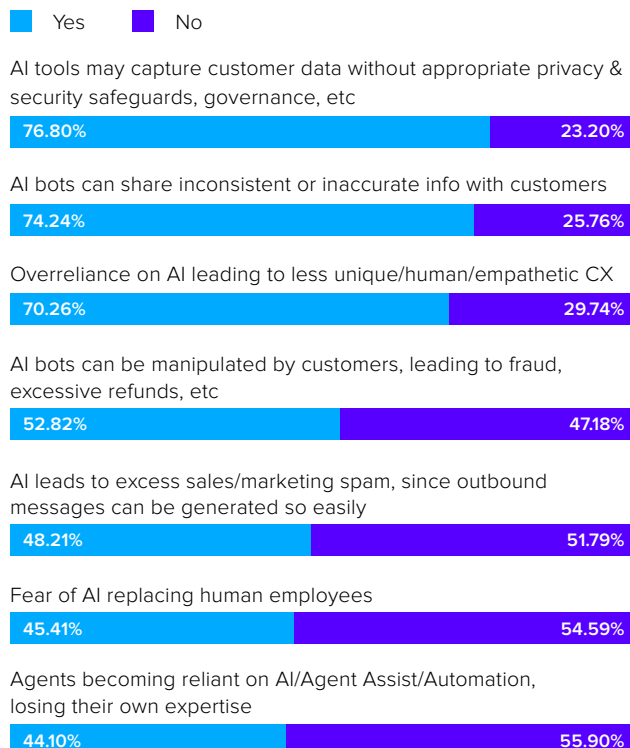
As generative AI proves itself to be a legitimate vehicle for meaningful, customer-facing automation, the significance of these risk factors becomes clearer.

Because generative AI solutions actively craft unique messages based on personalized, nuanced data, brands forfeit at least some autonomy over what their customer- and agent-facing bots are saying. This elevates the risk of inaccuracies and inconsistencies, in turn heightening the importance of proactively establishing limits, rethinking policies, and revising knowledge entries.

It also potentially opens the door to manipulation, as savvy customers can weaponize the solution's conversational capability and prey on its hallucinations. A recent CCW Digital webinar, as an example, highlighted a scenario in which a customer easily (and incorrectly) convinced a chatbot to verify that a medical procedure was covered by insurance.

When self-service was limited to a static FAQ page or a cumbersome IVR experience, customer-centric brands could not, in good conscience, eliminate access to live agents. But if *generative AI-driven* self-service lives up to the potential, brands may feel less guilty about taking that action. This fear of automating humanity *out* of the contact center is clearly becoming a legitimate one.

How has your contact center/CX team's perspective on the following generative AI risks, fears, and challenges changed over the past year?





What Generative AI Means for Self-Service

When it comes to the customer experience, no pain point is more common – or frustrating – than waiting on hold. A staggering two-thirds of customers say they *frequently* experience long wait times when dealing with customer service teams.

As a way for customers to avoid this waiting and solve problems on their own terms, self-service *should* be a highly popular option. It *should* represent a beacon of customer centricity.

Its real-world reputation is far less glowing. Only 20% trust self-service as a productive support option, and 95% still expect access to agents for some or all issues. In a sobering review of the FAQ pages, IVR systems, self-help portals, and chatbots they have thus far experienced, customers would rather endure excessive hold times and repetitive questions than use self-service.

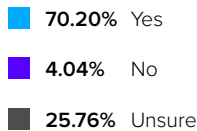
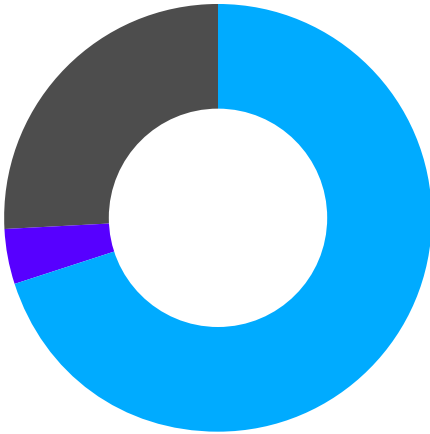
Knowing that self-service is essential for *simplifying the customer journey* and *scaling customer support operations*, the contact center community cannot accept this reality. It must work to achieve greater customer buy-in and utilization.

Thankfully, generative AI may be the solution.

Having witnessed the power of modern chatbots, whether in the form of their own contact center initiatives or mainstream projects like ChatGPT, 70% of leaders are confident that generative AI will meaningfully elevate the quality, value, and efficiency of self-service. This, naturally, suggests huge confidence that companies can finally free bots and IVR platforms from consumer stigma, transforming their image from modes of deflection into pathways to empowerment.

The key, of course, will be to use generative AI to craft the right kind of self-service experience.

Based on your experience, do you feel generative AI will meaningfully elevate the quality, value, and efficiency of self-service?



A NEW STANDARD FOR SELF-SERVICE

What does the ideal self-service experience entail? According to 97% of contact center leaders, it includes a significant emphasis on personalization. Indeed, the overwhelming majority of leaders feel bots must tailor experiences to individual needs, profiles, and communication styles.

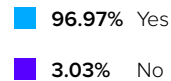
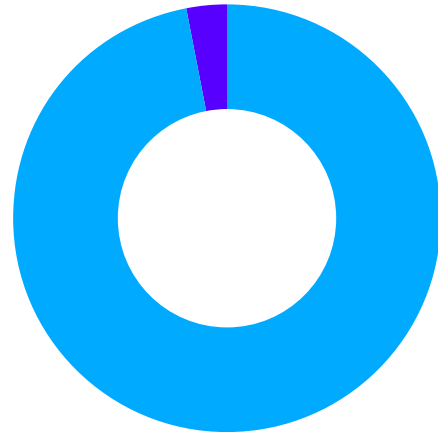
This caliber of personalization has historically been lacking from the self-service experience. Previous generations of bots and IVRs, let alone static FAQ pages and knowledge bases, are known for regurgitating generic information that is not even intuitive, let alone tailored to individual communication quirks. To break from the negative stigma, it is imperative for self-service experiences to *recognize* individual customers and their issues – and enable them to communicate their needs in organic, conversational ways.

But leaders do not simply want to make self-service experiences more *personal*. A nearly-as-significant 91% believe bots also have to provide meaningful *resolutions*.

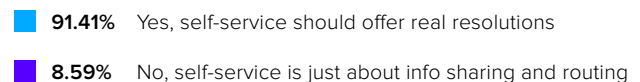
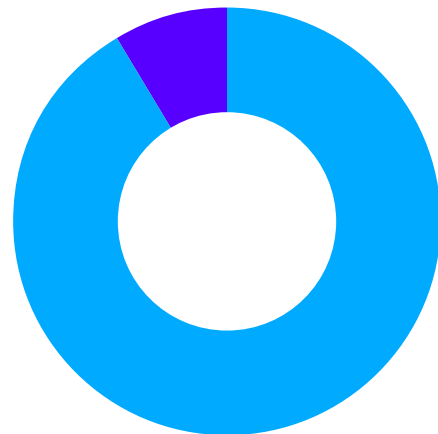
As far as these leaders are concerned, customers are not looking for bots to *restate* company policies and guidelines. Instead, they are looking for self-service platforms that can take actions, such as changing orders, making exceptions to policies, or providing refunds and compensatory gestures.

After all, customers already have Google to provide them with a company's standard procedures and answers. If they are going to take the extra step of engaging, they are going to be seeking something that *cannot be solved* with a generic information dump. And if they do not feel a bot or IVR can provide that solution, they might as well spend their time waiting on hold to speak to a live agent.

Do you feel it is important for self-service experiences to be personalized to individual customer needs, profiles, and communication styles?



Do you feel it is important for self-service experiences to offer real resolutions (such as refunds or exceptions) as opposed to simply restating policy, sharing knowledge, or routing customers to live agents?



THE ROLE OF GENERATIVE AI

The idea of a more personalized, resolute approach to self-service is surely exciting. By prioritizing some unique capabilities of generative AI solutions, contact center leaders can make this exciting concept a reality.

Presently, they are most confident in generative AI's ability to support more contextual engagement. Nearly 89% expect generative AI to make self-service more relevant, ensuring the conversation is tailored to the customer's *actual situation* rather than a knowledge base entry written in an insulated office five years earlier.

The overwhelming majority of contact center leaders also expect generative AI to help boost speed and efficiency (86%), capture real-time data to improve escalation (86%), capture data to improve overarching customer experience design (86%), improve personalization (83%), support natural language communication (82%), and address a wider scope of issues (77%).

This across-the-board optimism suggests that leaders do not simply see generative AI as a way to elevate self-service: they also see it as a way to ensure self-service touchpoints make a more valuable contribution to the overall customer journey.

Improving natural language communication, covering a wider array of issues, elevating personalization, and boosting speed and efficiency ensure that self-service experiences will be more user-friendly, relevant, and supportive. Customers will have more faith that self-service experiences will be worth their while. They will have more desire to meaningfully engage.

Coupled with more intelligent and personalized automated decision-making, this enthusiasm will lead to increases in resolution quality and containment.

But even if a particular engagement does not end in a resolution, customers' greater willingness to engage – and greater comfort communicating in natural language – will create an unparalleled intelligence opportunity. Through self-service interactions, brands will gain a robust understanding of what issues customers are facing, how they instinctively communicate those issues, and what outcomes they will and will not accept. In the short-term, this will lead to more seamless and productive routing and escalations. In the long-term, this will help brands address root causes and proactively support customers *before* issues even arise.

Do you expect to address the following aspects of your company's self-service experience with generative AI?

Yes No

Context/relevance of self-service communication

89.23% 10.77%

Speed/efficiency/effort of self-service interactions

86.29% 13.71%

Ability to capture and analyze real-time data for improving routing and escalation to live agents

86.22% 13.78%

Ability to capture and analyze data for better understanding customer behavior, intent, sentiment

86.08% 13.92%

Ability to personalize self-service interactions

82.65% 17.35%

Ability to better understand and communicate with customers in natural language

82.32% 17.68%

Ability to handle a wider array of customer issues and/or resolutions

76.53% 23.47%



What Generative AI Means for the Agent Experience

In the theater, what happens behind-the-scenes directly impacts what happens on stage. In the contact center, the agent experience directly impacts the customer experience.

Mindful of this connection between employee performance and customer happiness, many contact center leaders are evaluating agent-facing AI solutions. Some may even prioritize agent-facing AI over customer-facing solutions, subscribing to the belief that *empowered agents* can more immediately move the customer experience needle than intelligent bots. Additionally, risks related to hallucinations and inaccurate communication are less significant for *internal* automation solutions, since agents are in a better position to identify and correct such mistakes before they reach the public.

Investing in agent-facing AI, does, however, introduce a new challenge worth considering: hesitation, if not skepticism, about embracing new technology. If agents do not see the incentive in learning to use new solutions – or, worse, see the new solutions as a *threat* to their job security – they could undermine the efficacy of the investment. The business will not be able to maximize the impact of the new solutions, ultimately introducing new technology costs without new rewards.

It is in anticipation of such resistance that leaders identify the user experience as a pivotal AI investment concern. But if they do not simultaneously work to reduce mental resistance and demonstrate real incentives to using the technology, they will still face a bottleneck on their success.

EMPLOYEE CONCERNS ABOUT GENERATIVE AI

While leaders are less worried about potential AI-driven job loss than they were last year, agents remain very wary of the situation. An alarming 79% of leaders acknowledge that their agents are worried that the rise of AI might come at the expense of their jobs.

The concern, moreover, goes beyond potential job loss. A nearly-as-significant 75% of leaders feel agents are worried that the growing emphasis on AI may lead to a reduction in humanity *within* the contact center. If companies invest in AI for workforce optimization, training, knowledge management, and quality scoring, will agents have less opportunity to engage in meaningful conversations with peers and supervisors?

Other employee-centric concerns include the learning curve associated with new tools (69%), the *adverse* impact self-service may have on customer sentiment (65%), compensatory cost-cutting that may result from AI investments (63%), and the shift to more draining work (59%).

The pivot to more complex work is traditionally positioned as a pro-employee transformation, but this data reveals the need to consider nuance. Employees may not enjoy their present focus on repetitive questions and password reset requests, but that does not mean they are unabashedly eager to spend their entire days answering complicated questions from demanding customers. Demanding customers, it is worth noting, that may be *particularly angry* since they just exerted effort on an unproductive chatbot or IVR conversation.

Leaders know that difficult technology will thwart buy-in, which is why they are right to prioritize the user experience. But the best ones will not stop there; they will also ensure that the value of the technology is so clear that agents will not worry about “what could have been” had the business allocated its AI budget to different tools or cultural initiatives.

Do your employees/agents have any of the following concerns about AI?

■ Yes ■ No

Fear that AI might eliminate their jobs



Fear that AI could eliminate the human touch behind-the-scenes (such as automated coaching, performance management, etc)



Concern about needing to learn how to use new AI tech/tools



Concern that emphasis on self-service could frustrate customers, leading to more hostile escalations



Fear that AI investments might lead to cost-cutting in other areas (such as training or compensation)



Concern about shifting to more challenging/difficult/emotional work



ADDRESSING THE TOP AGENT PAIN POINTS

To demonstrate that value, savvy contact center leaders will focus on alleviating prevailing agent pain points. If a new solution actively makes an agent's work experience easier and more rewarding, it stands a far greater chance of gaining adoption.

The higher likelihood of adoption, moreover, says nothing of the potential impact on performance.

When it comes to agent effort, no task creates more frustration than looking up answers to customer questions. More than 86% of leaders say their agents waste too much time on that pursuit.

Other top effort sources include accessing or updating knowledge bases (75%), accessing information about customers and their previous interactions (74%), getting internal help (73%), and intra-call activities like note-taking (72%).

The most effective generative AI investments, therefore, will achieve key goals:

- Provide real-time guidance to agents, thus reducing their need to spend time pouring through knowledge bases or surmising answers to customer inquiries.
- Update, unify, and streamline knowledge bases to help agents make better, more efficient use of such information.
- Empower agents with actionable intelligence about customers to foster more contextual, personalized conversations.
- Reduce reliance on peer support, while also simplifying the process of reaching internal experts and securing supervisor approvals.
- Eliminate mid-interaction distractions so that agents can focus more intently on connecting with customers.

Encouragingly, leaders seem to be prioritizing generative AI solutions that are conducive to these objectives.

On the radar for 83%, knowledge management represents the #1 agent-facing AI initiative for 2024. Other top focuses include agent assistance and guidance (76%), call recording and note-taking solutions (72%), real-time customer data and sentiment analytics (70%), and intelligent routing (65%).

Since leaders are clearly focusing on the right technology categories, attention should turn to creating the optimal environment for these solutions. This includes fostering a knowledge culture that empowers collaboration on the best ways to generate, analyze, and update knowledge content. It also involves *rewriting knowledge entries* so that they represent suitable models on which to train generative AI solutions.

Further considerations include unifying data to provide “single sources of truth,” coaching and empowering agents to use customer data to deliver more empathetic and personalized support, inviting them to go off-script to provide unique resolutions to unexpected customer questions, and encouraging them to use their extra attention to truly *listen to and learn from* the customers they are supporting.

In general, do you feel your agents/ reps exert too much time / effort on the following tasks?

Yes No

Looking up answers to customers' questions



Accessing and/or updating company knowledge bases



Accessing info about customers and/or their previous interactions



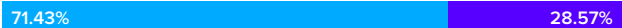
Getting internal help, collaboration, and approvals



Call notes and other intra-call activities



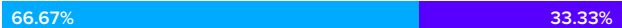
Post-call summaries and wrap-up work



Actually solving the customer's issue, processing the transaction, etc



Customer verification/authentication



Training/coaching/performance reviews



Sharing feedback about customers/experiences



Identifying why the customer is contacting



Team meetings and "culture" initiatives



Are you prioritizing the following employee-facing AI initiatives in 2024?

Yes No

Knowledge management and internal search



Agent assist/real-time guidance



Call recordings, note-taking, and transcriptions



Real-time customer data and sentiment analysis



Intelligent routing and escalation improvement



Post-call/wrap-up work



Training/coaching



Scheduling and administrative improvements



Performance scoring and management



Noise-cancelling and other quality control measures





The Next Step: Rethinking the Role of the Contact Center Employee

What happens if generative AI actually works? What if it actually does transform the customer contact landscape? So accustomed to technology that falls short of the hype, contact center leaders have rarely had to confront these types of questions. They have rarely had to prepare for next-generation operations.

But given the promise and optimism surrounding generative AI, it is imperative that they begin preparing for an era in which self-service *is more effective* and in which agents *can* pivot to more complex work.

Fortunately, leaders are beginning to consider the potential consequences of the AI transformation.

Specifically, 78% acknowledge the need to rethink agent compensation and career pathing. They know that agents, no matter how disillusioned they may be with simple issues, do not work out of the kindness of their heart.

They work to make a living, and if the difficulty and stakes of that work become more significant, they will expect better pay and opportunities.

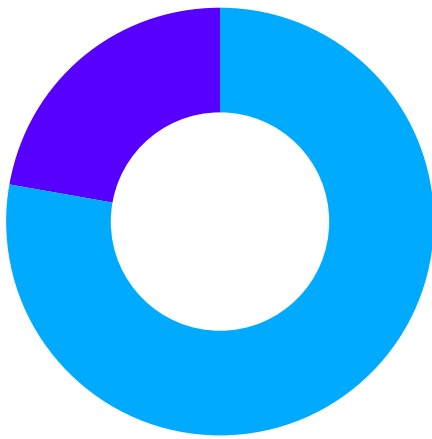
Nearly 69% understand the need to rethink metrics and performance assessments. As agents pivot to less predictable, more conversational support inquiries – albeit with enhanced guidance and support from AI tools – the definition of “good” will change. Certain benchmarks may become less relevant, while others will rise to the forefront as more powerful indicators of success.

Despite identifying the impact on learning and development as a comparatively small *investment consideration*, the need to cultivate new employee skills is very much keeping leaders up at night. More than 60% highlight the need to begin hiring and training for different employee and supervisor competencies.

Fortunately, leaders know that generative AI can also *help* with this endeavor.

Nearly 92% of leaders, for example, believe that the ability to automate low-value work will give employees more time to master new, more critical skills. Almost 90% feel generative AI's ability to capture and glean better intelligence will result in more informed, productive training, while 83% believe they can leverage the power of generative AI to *create* more valuable training courses and material.

Given the potential workflow impacts of AI, such as "AI will automate simple issues so agents focus on complex work," do you feel it is important to rethink compensation and career pathing for CX/contact center employees?



■ 77.78% Yes
■ 22.22% No

Amid the growing emphasis on AI, have you begun / will you begin re-evaluating metrics and performance assessments?



■ 69.19% Yes
■ 30.81% No

The ability to use agent assist in lieu of traditional classroom training (83%) and the ability to develop more personalized, targeted coaching (74%) also represent ways in which generative AI tools can empower agents to thrive in an AI-driven world.

Amid the growing emphasis on AI, have you begun / will you begin hiring and training for different employee and/or supervisor competencies?



■ 60.10% Yes
■ 39.90% No

Do your employees/agents have any of the following concerns about AI?

■ Yes ■ No

Automating low-value work, enabling agents to spend more time building more valuable skills

91.84% 8.16%

Gathering better data about customer needs & agent performance, leading to better training and development strategies

89.80% 10.20%

Creating more relevant training material, leading to more valuable and efficient training

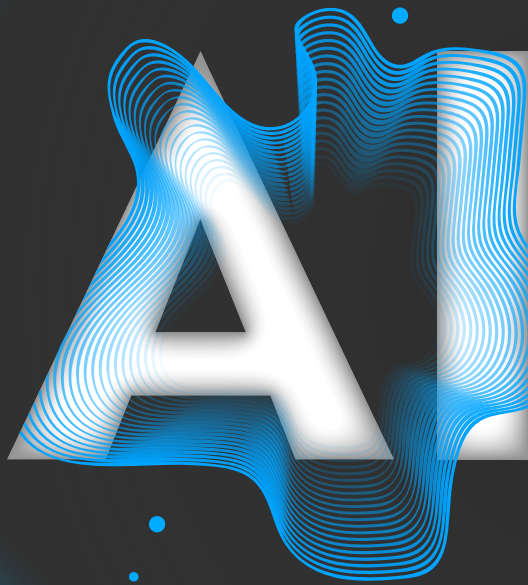
83.25% 16.75%

Providing real-time knowledge/agent assist, enabling agents to handle inquiries without as much training

82.74% 17.26%

Facilitating more personalized coaching, leading to faster agent development

74.49% 25.51%



Market Study:
**State of
Generative AI**

PRACTICALITY **GUIDE**



How to Operationalize AI Workflows in the Contact Center

Making AI useful to your team's day-to-day work, while driving company-wide ROI

When it comes to embracing AI technology in your contact center, it's easy to get caught up in the hype. [McKinsey estimates](#) that AI adoption has more than doubled in the past five years. Yet, adoption and successful implementation are two different things. Organizations need to double down on operationalizing AI in the contact center to realize its true value.

In other words, it's important to know how AI fits within your team's day-to-day workflow — including quality managers, business analysts, agents, supervisors, and employees beyond the contact center. Focusing on these fundamentals can help your organization gain more value and ROI from AI technology for the contact center, including conversation intelligence.

According to [Forrester](#)¹, “The true standouts are those that have gone beyond the basics, crafting enterprise-ready workflows that intelligently incorporate generative AI and ML. As buyers consider their options, they should prioritize vendors that not only incorporate AI and ML but also prioritize their role in augmenting human workflows, empowering frontline agents and operations staff.”

The workflows that are most important to your organization will largely depend on your team's priorities, and what's most useful to the business. Let's review some of the most widely used AI-driven conversation intelligence workflows used in day-to-day contact center operations and beyond, and how they impact organizational efficiency and effectiveness.

¹ The Forrester Wave™: Conversation Intelligence For Customer Service, Q3 2023 (Christina McAllister with Ian Jacobs, Catherine Marcin, Shayna Neuburg)

WHAT IS AN AI WORKFLOW?

Workflows help to accelerate the adoption of AI within the organization. They are the rules that govern what happens with AI's outputs. The job of a workflow is to make the underlying technology inherently useful to employees' day-to-day tasks. Think of a workflow as a practical approach to delivering business value with an underlying AI capability.

Menlo Ventures' "State of Generative AI in the Enterprise" report predicted that enterprise adoption of generative AI (which is just one of the many types of AI used today, albeit the one with the most buzz) would accelerate with the use of "powerful, context-aware, data-rich workflows." If technology fails to deliver these workflows, the productivity gains can feel limited, and teams may not achieve their optimal ROI.

On the other hand, proven technologies with built-in workflows are enterprise ready, and can accelerate the adoption and the utility of AI across not just the contact center, but other departments in the organization.

Operationalizing Contact Center Workflows

With AI adoption, the cart is often leading the horse. Many teams focus on the AI technology in and of itself – AI for the sake of AI – instead of the outcome they wish to achieve or the value they're trying to drive for customers. Instead, it's critical to consider the problem you're trying to solve and work backward. Shape your workflows around that problem, and allow them to drive value for your chosen solution.

Many workflow-based AI solutions categorize customer interactions, so teams can gain a greater understanding of contact center performance, compliance adherence, customer sentiment and emotion, and other important indicators. For example, one category might focus on contact drivers, or the underlying reasons why customers are reaching out to your contact or customer service center. Another might focus on repeat call language, which may indicate that an issue hasn't been resolved in a timely manner, or an indication of a deeper process issue that needs to be solved.

When viewed at the trend-level — paired with dashboards, scorecards and other methods of distilling information — these categories can provide critical insights into the Voice of the Customer (VoC) and other critical contact center KPIs. A workflow makes practical use of this information, driving meaningful change both inside and outside the contact center.

Overall, contact center workflows are focused on providing agents and supervisors with feedback — both during customer interactions and post-interaction. The goal is to create a virtuous cycle, informing agents to make them more effective based on how they have done in the past, or reinforcing positive behaviors. In addition, real-time guidance and alerts can help them better handle difficult situations in the moment.

FIVE PRACTICAL EXAMPLES OF CONTACT CENTER WORKFLOWS

Here are some practical examples of contact center workflows:

Coaching: Coaching workflows aggregate insights from customer conversations, identifying which agents are most effective based on customized manual or automated scoring criteria. By deeply understanding agent and customer interactions, supervisors can identify performance trends, target behavior for guidance or reinforcement, and create a persistent culture of improvement.

Real-Time Agent Guidance: Real-time guidance offers agents immediate suggestions on how to improve a customer conversation, while it's still in progress. Based on predetermined parameters, such as scripting compliance, customer statements or competitive mentions, real-time alerts can help agents more effectively navigate through customer interactions and deliver better outcomes. These workflows also empower agents to ask for supervisor support, such as escalations, as needed.

Quality Management: By automating the entire or part of the quality assurance (QA) scoring and analysis process, teams can evaluate 100% of their customer interactions to ensure that they're compliant with industry-specific standards. These workflows help both agents and supervisors identify and improve non-compliant language or actions, driving positive change and reducing non-compliance risk.

Summarization/After-Call Work: Contact summarization uses AI to automatically create objective, standardized summaries that can help agents recover time previously spent doing manual summaries as part of their after-call work. Analysts and supervisors can use these summaries to inform their investigations into potential issues and improve their coaching capabilities.

Collections: In a collections setting, navigating complex customer interactions with empathy and trust is critical. Debt recovery, regulation adherence, and vulnerability compliance workflows can help agents better understand and meet customers' unique needs, while improving business outcomes.

LEVERAGING WORKFLOWS BEYOND THE CONTACT CENTER

Customer feedback, both unsolicited and solicited, is incredibly valuable to the organization across many different departments, not just the contact center. Many teams look to leverage VoC insights to drive business transformation in departments including marketing, product development, sales, executive leadership, and more. Combined with the solicited feedback obtained from surveys and other mechanisms, unsolicited feedback from conversation intelligence systems can help provide a more holistic view of customer experience.

Unsolicited feedback is valuable because it uses what the customer says in their own words, without being asked. What do they like or not like about your business? Did they experience issues with a specific product that might indicate a warranty claim or a recall? How did they react to a specific marketing campaign or sales outreach? It's important to understand these insights, and leverage them to drive results such as improved products, services, or marketing campaigns.

Practical ways to use workflows across the business

Workflows can be customized to specific business needs and requirements; however, here are a few examples:

Customer Experience (CX)

- **CX effort:** These workflows identify when how hard (or easy) a customer has to work to engage with your brand, such as if it takes them multiple attempts to connect with the right support person, having to repeat their reason for contact, etc. Paired with a customer effort score (CES), CX teams can take the right measures to reduce friction and frustration in the customer journey.
- **Customer satisfaction (CSAT):** This measures a customer's level of satisfaction or dissatisfaction, alongside other instances of escalation or complaints. Understanding CSAT can help with targeting specific customers for direct outreach or identifying patterns for improvement at scale.
- **Emotion:** Emotion goes beyond the basic positive or negative sentiment indicators to measure emotions such as anger, disgust, fear, satisfaction, happiness, and excitement. Understanding emotion can help CX teams and agents drive significant improvements, such as properly serving vulnerable customers.
- **Churn risk:** Retention is critical in today's economy. This workflow helps CX teams understand indicators of churn, such as mentioning a competitor or a cancellation, and address churn-likely customers before it's too late.

Sales

- **Sales effectiveness:** This workflow tracks an agent's use of sales techniques when making and closing an offer. Using a sales pitch score, agents and supervisors can understand when the right product descriptions, pricing, benefits, or other language is used. Analyzing these scores can help supervisors properly coach effective sales techniques, and connect behavior to revenue gained.
- **Script adherence:** For sales teams that use scripts, script adherence can determine whether agents are using the correct language to close an offer. Like sales effectiveness, this workflow can be leveraged to improve sales outcomes.

Marketing

- **Brand sentiment:** Marketers can monitor omnichannel brand sentiment. Equipped with this information, marketers can make smarter decisions about campaigns and take action to avert brand crises before it's too late.
- **Spend optimization:** This workflow can aid marketers in attribution, determining whether spend in a particular channel led to the intended outcomes. It can also help with A/B testing, allowing marketers to test versions of their campaign language to determine what drives the best results.
- **Campaign effectiveness:** Marketers can uncover top trends, topics and market responses, or surface compelling user-generated content to inspire campaign ideas. Authentic customer feedback can help teams better understand drivers of campaign effectiveness and make strategic improvements.

ENSURE CROSS-ORGANIZATIONAL ALIGNMENT WITH EXECUTIVE REPORTING

Getting the right information to the right executives in the right format is critical. Across all departments, executives need high-level data about what's happening with employees and customers — and why. Executive reporting workflows further increase the usability and visibility of data across the organization, enabling teams to take action on trends and understand the impact of performance on the bottom line.

The most effective solutions provide executive-level dashboards, which go beyond charts to provide contextual information about why certain trends occur. Dashboards should highlight major deviations from KPIs, and automatically notify the right executives based on an organization's hierarchy or structure.

DRIVING ROI AND AI USABILITY WITH WORKFLOWS

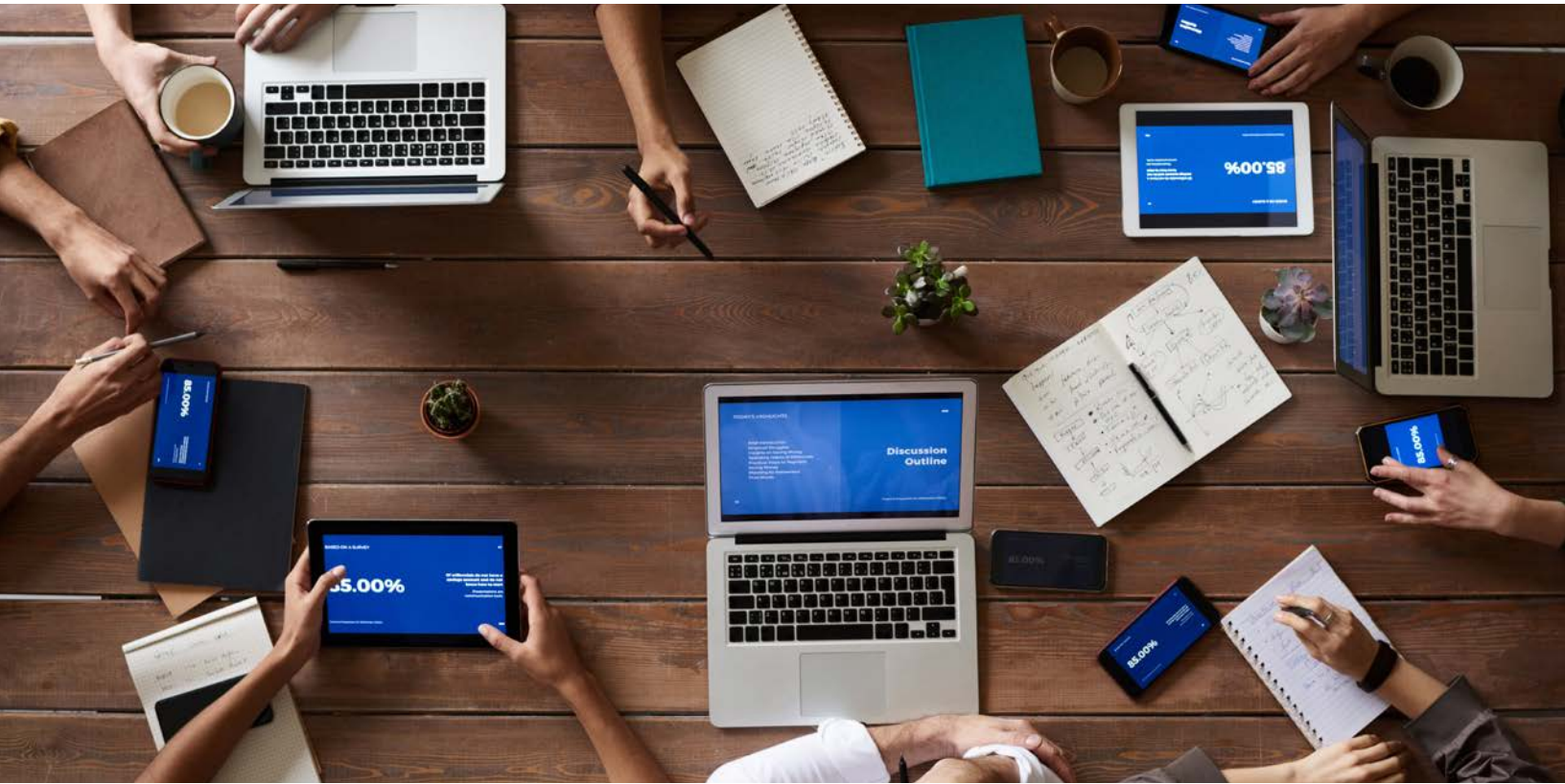
As demonstrated by the examples above, workflows can help your contact center function more efficiently and effectively. They can also elevate customer insight outside the contact center, and make those insights actionable for the rest of the business.

When implementing any type of AI, including within a conversation intelligence platform, focus on the outcome you're aiming to achieve or the value you're trying to drive for customers. This will help you determine the workflows you need to reach practical outcomes with your AI systems. When equipped with the right workflows, your team can generate near-immediate value and prove the ROI of these technologies to your organization.

ABOUT CALLMINER

CallMiner is the global leader in conversation intelligence to drive business performance improvement. Powered by artificial intelligence and machine learning, CallMiner delivers the industry's most comprehensive platform to analyze omnichannel customer interactions at scale, allowing organizations to interpret sentiment and identify patterns to reveal deep understanding from every conversation.

By connecting the dots between insights and action, CallMiner enables companies to identify areas of opportunity to drive business improvement, growth and transformational change more effectively than ever before. CallMiner is trusted by the world's leading organizations across retail, financial services, healthcare and insurance, travel and hospitality, and more.



How To Transform Your CX With An Intelligent Approach to AI

Despite widespread industry emphasis on digital customer service, only 20% of consumers presently trust chatbots to solve their problems. Despite all the discussion about eliminating simple tasks, 68% of contact center leaders concede that their agents spend too much time on low-value work.

These sobering statistics are **not**, however, a condemnation of artificial intelligence solutions. They are **not** proof that this supposedly transformative technology is falling short of the hype.

Rather, they are a consequence of contact centers failing to harness the true power of artificial intelligence – and instead settling for an archaic iteration of “automation.” They are not using conversational and generative AI solutions to engage in natural communication, glean actionable intelligence, and proactively pursue improvement opportunities.

To achieve real transformation, it is imperative to take a more intelligent, innovative approach to AI investments. It is essential to establish a more customer-centric vision for these initiatives, while viewing risk management as a way to *guarantee quality* rather than as an excuse to *reject opportunities*. Quite simply, it is vital to let artificial intelligence *be* artificial intelligence.

This briefing will reveal three cornerstones of an intelligent AI strategy, before concluding with an important call to action.

PHASE #1: RETHINKING THE CUSTOMER JOURNEY

In today's contact center environment, leaders are leaving their customers between a rock and a hard place. On the one hand, they are not delivering efficient self-service experiences. As they are so often impersonal, generic, and more about *information dumping* than contextual resolution, it should come as no surprise that so many customers remain reliant on live agents.

Unfortunately, these agents are ill-equipped to succeed. Saddled by restrictive policies, cumbersome processes, minimal training, and limited flexibility, these agents *also* struggle to give customers the personalized, consultative support for which they are ultimately looking.

To improve, successful organizations will approach the customer journey in a three-step progression, harnessing generative AI at each moment of truth.

Proactive Resolution

The best customer service interaction is one that is avoided. Successful brands make it their imperative to harness actionable intelligence for the sake of pre-empting likely issues and proactively delighting customers. By identifying and addressing root causes, anticipating customer intentions, and predicting future behaviors, brands can greatly reduce customer time and effort – and potentially prevent them from ever having to make contact. They can also better tailor *marketing communication*, leading to greater sales conversions and fewer unsubscribes.

Intelligent Self-Service

Granted, not all issues can be completely avoided. Many can, however, be easily addressed on the customers' preferred terms. By implementing conversational and generative AI-driven bots, brands can provide self-service experiences that *actually work*. From pre-empting repetitive questions, to enabling customers to engage in natural language, to delivering personalized resolutions, to providing guidance on future needs, intelligent self-service provides *support* rather than mere information sharing.

"I disagree with the traditional point of view that argues that customers don't want to talk to chatbots but want to talk to humans. Customers want to resolve their issues and would rather self-serve than talk to an agent to do so. Thanks to solutions like Sprinklr AI+, the traditional trade-off between volume and quality no longer exists. An effective Generative AI chatbot can deliver personalization at scale, the bot experience, including TTS, should be non-robotic and offer dynamic journeys."

- Yoginkumar Patel, VP Engineering, Sprinklr

"One of the most significant additions to Sprinklr's AI strategy is its Conversational AI+ capability, launched in 2023. A dynamic capability introduced to amplify self-service functionalities, Conversational AI+ allows enterprises to tailor solutions to their business's AI maturity level and a wide variety of service use cases. Our next step is adding new GenAI use cases, and ultimately making everything GenAI-first. This should result in interacting with the platform the same way one would interact with Chat GPT-type interfaces. Let me illustrate this through a real-world example, in which Sprinklr AI+ is driving personalization at scale for a multibillion dollar consumer electronics company. At the beginning of this experiment, the traditional chatbot was able to resolve 36% of the cases, while 32% of cases were transferred to agents. After introducing Conversational AI+, Sprinklr's Generative AI-powered Conversational AI, the bot was able to successfully resolve 47% of the cases and transfers to agents were capped at 26%. Thus, we saw a massive 11% improvement in case resolution and a 6% improvement in containment."

- Aurelien Caye, Lead Solution Specialist, Sprinklr

Seamless Escalation to Consultative Agents

Bots are increasingly capable of addressing complex, hyper-nuanced matters, but that does not mean they always should. There are still some cases where agent support can actually prove more efficient and effective, and customer-centric brands will incorporate that element into their journeys.

The key, of course, is to provide a seamless escalation to an agent who is not only readily aware of the customer and their issue but capable of providing the deeper, more consultative support for which they are looking.

From a user experience standpoint, this involves using generative AI to uncover key insights from the customer's profile or initial self-service conversation, intelligently route the customer to the most suitable agent, and then empower the agent with vital context for continuing – and elevating – the conversation. It also involves reducing the barriers that prevent agents from properly focusing on the customer, ensuring that they perform as a committed consultant rather than as a distracted script reader.

Beyond powering better bot and routing experiences, generative AI solutions can eliminate the most notable points of agent friction.

“Bad workflows are those where customers feel they’re going around in circles, and agents feel they are scrambling for the right response path. With AI, companies can address workflows during and post conversations. Gen AI can analyze extensive datasets, like FAQs, and extract nuanced responses. This was extremely hard to do in the past, but with AI, it’s becoming infinitely more efficient. Post conversation, Gen AI can do a lot of heavy lifting to appropriately summarize and derive insights for continuous learning. It also helps power personalized coaching opportunities for supervisors. Sprinklr AI+ further improves agent productivity and efficiency and allows them to focus on tasks that matter. Sprinklr has innovated on several improvements with the agent experience: case summarization, reply assistance, and knowledge base extraction.” - Aurelien Caye, Sprinklr

PHASE #2: RETHINKING CONTACT CENTER INTELLIGENCE

Data is critical to the aforementioned customer journey. Without insight into the *why* behind customer interactions, brands cannot deliver proactive support. Without insight into customer preferences and intentions during self-service interactions, brands cannot design supportive bot experiences. Without insight into customer personas or agent performance challenges, brands cannot empower agents to deliver more relevant, consultative support.

Unfortunately, numerous foundational challenges prevent brands from accessing and leveraging the data they need. This includes disconnected systems, insufficient data, and a short-sighted approach to insights, whereby brands focus on “scoring” performance or superficially personalizing interactions (through name-drops) rather than identifying improvement areas or anticipating unique customer needs.

To meet the appropriate standard for customer intelligence, it is imperative to establish the right experience management framework within the contact center. Beyond providing a more informative, singular source of truth, this approach fosters the development of “insights hubs” that greatly increase the clarity of intelligence – and reduce the time to action.

“By aggregating customer feedback (both solicited and unsolicited) and consolidating this with owned data from CRMs, CDPs and other similar systems, Sprinklr can create a unified data layer that can in turn drive more comprehensive and accurate insights. This Unified Layer becomes the foundation for insights and intelligence ... with Insights Hub, we can significantly reduce the time-to-insight by delivering ‘insights as an entity.’ There are broadly 3 types of insights we deliver: anomalies, trends, and stories.” - Yoginkumar Patel, Sprinklr

With these actionable insights readily accessible and democratized across the business, brands can actually *leverage* data in three specific ways.

Root Cause Analysis

With a clearer window into why customers require support *and* why certain bot or agent-led interactions prove unsuccessful, brands can elevate their entire experience journey. From pre-empting common issues to bypassing unnecessary steps, brands will reduce customer effort, heighten personalization, and deliver more valuable resolutions.

Using Smart Intents to Build Best Practices

“Sprinklr leverages unsupervised clustering to discover unknown intents through a capability colloquially known within Sprinklr as ‘Smart Intents.’” - Aurelien Caye, Sprinklr

By correlating this smarter understanding of intents with specific actions and their impact on customer satisfaction, brands can redesign their best practices playbooks for each intent. This can lead to more effective self-service conversation flows, more productive real-time agent “nudges,” and more meaningful agent quality scoring. To put it simply, it helps brands advance from delivering *good support* to delivering *the right support for each moment of truth*.

Intelligent Agent Coaching

As the Market Study reveals, today’s contact center leaders are not simply hoping AI will streamline agent workflows. They are also hoping the technology will elevate agent coaching and performance management, ensuring they are better equipped to handle increasingly complex tasks. Innovation around this opportunity is already underway, with leaders like Sprinklr working to make initial agent onboarding faster – and subsequent agent coaching more relevant and personalized.

“Sprinklr’s Unified CaaS offering is built on an AI-first platform and Generative AI is core to it and powers agent experience across the lifecycle of a case and beyond. What we have seen is, when agents use AI, ramp-up time is reduced to a month. If they don’t have AI it takes about 120 days for them to ramp up adequately. We are also building a new capability around agent coaching with Sprinklr AI+. Generative AI pretends to be a customer and gives agents a mock case. It evaluates and scores agent performance and identifies areas of improvement. This is expected to significantly reduce agent ramp up time.” - Yoginkumar Patel, Sprinklr

PHASE #3: RETHINKING ADOPTION CHALLENGES

As familiarity with AI solutions grows, so too does concern about potential risks. Discussions about possible inaccuracies, hallucinations, and customer manipulation are becoming top-of-mind for contact center leaders, explaining why 90% say risk consideration is vital to their AI sourcing.

It is important, however, to remember that the potential for risk goes beyond inaccurate or inconsistent communication. It also includes subjecting customers to low-quality, difficult, or otherwise frustrating conversations. If a customer experiences an unreliable bot experience, or if an agent receives a suspect prompt, *user trust and adoption* will suffer. The result will be a significant bottleneck on the financial return – and long-term efficacy – of AI investments.

This bigger-picture, more nuanced approach to risk management encompasses five pillars:

Hallucinations

The AI makes up factually incorrect information that is not part of the knowledge base on which it was trained, leading to inconsistent and potentially costly communication.

Contextual Alignment

It is not enough for the bot to *accurately* communicate the information on which it was trained; it must also adapt the conversation to the unique context of the interaction. Self-service has historically struggled in this area, coming across more as a broad information hub than a tailored support vehicle.

Conciseness And Clarity

Convenience is key to customer satisfaction; which means it is imperative for AI to generate communication that is not only accurate and relevant but clear, concise, and intuitive. If the customer needs an agent to *explain* the prompt, self-service containment is impossible.

Handshake With Other Systems

Whether to deliver personalized communication or actually perform actions, bots require the ability to securely integrate with other crucial databases and enterprise systems. This connectivity is a notorious challenge for the contact center, which has often relegated the bot to a silo – and thus reduced its value as a support tool.

Guardrails

Nearly 97% of contact center leaders feel self-service should be personalized, and more than 91% believe it should offer *actual* resolutions. These goals are logical in theory, but they can become risky without the appropriate guardrails. Organizations have historically neglected or struggled to establish these boundaries, resulting in a risk of bias, data misuse, or improper resolution delivery.

Though serious, these risks are not a reason to avoid generative AI initiatives. The best generative AI, in fact, helps to *execute* effective risk management that leads to more credible, consistent, user-friendly experiences for both customers and agents.

By auditing their knowledge base, analyzing customer journey maps, and establishing “limits” for the types of issues (and types of resolutions) bots can address, brands can go a long way in creating AI-driven experiences that are sensible and robust without introducing undue risk. They can then apply key technology capabilities, like those offered by Sprinklr, to enhance, scale, and safeguard their risk management vision.

Sprinklr’s technology, for example, leverages advanced retrieval augmented generation to ensure every response includes a citation. This provides instant credibility for the user, while also helping the business more precisely identify and troubleshoot any mistakes.

The technology also empowers a multi-faceted approach to guardrails, encompassing global and topic-specific restrictions based on the nuances of the situation. This helps to achieve the ultimate balance between risk aversion and efficient service delivery.

Unwilling to rely on theory alone, Sprinklr's technology also includes jailbreak simulation to practically test the quality of the bot – and more accurately assess any potential risks or user experience challenges.

The end result will be a win on all fronts: users will gain access to a bot that provides accurate, consistent, personalized, and meaningful resolutions, while the business will have peace of mind that it will not be delivering automated experiences that violate privacy or compliance expectations, undermine the brand's vision, or result in excessive resolution costs.

LOOKING AHEAD: MAINTAIN A SYMBIOTIC APPROACH TO GENERATIVE AI

As the technology advances, frameworks improve, and familiarity builds, generative AI will empower contact centers to eliminate many sources of operational inadequacy, and in turn create the frictionless, personalized, predictive, and proactive experiences that warrant the label "customer centricity." Best of all, organizations will be in position to spur continuous improvement as they continue to uncover more actionable intelligence – and more opportunities for elevating journeys.

The key, however, is to appreciate the symbiosis between customer and employee experiences. As generative AI helps glean valuable customer intelligence and improve self-service experiences, it opens the door for agents to spend more time focusing on complex work. To seize this opportunity, companies will harness the power of generative AI to better empower agents with accurate scoring, effective coaching, and real-time interaction guidance.

These more capable agents can then return the favor, using their additional knowledge and experience to help score and train automated customer experiences.

In the end, employees will be happier and more productive, and customers will be more satisfied and loyal.



A Framework For CX Transformation: 3 Phases To Unlocking the Power of Generative Answering

A whopping 81% of contact center leaders believe generative AI will make a significant impact on their operations, and they are right to be so optimistic. Innovative generative AI solutions can unquestionably improve customer interactions, empower employee productivity, and elevate overall experience design.

They are wrong, however, if they assume generative AI can independently drive such results. It may be a powerful form of technology, but it is ultimately a tool for supporting transformation. It is not a transformation in its own right.

“Do not fall into the trap that GenAI will be the silver bullet to solving all your problems with the customer experience and employee experience. Your AI strategy needs to start with defining what type of

experience you want to deliver to your customers, identifying all the prerequisites to achieve this; AI will then be an important part of the solution.” - Patrick Martin, Chief Customer Officer, Coveo

To harness the power of generative AI and ultimately achieve meaningful customer and employee experience transformation, it is imperative to set the right vision, identify the most essential challenges and opportunities, build the optimal framework, and establish grounds for continuous improvement. It is crucial to achieve legitimate AI readiness.

This briefing will reveal the three critical phases of such a journey, helping you create a contact center environment that can truly experience the magic of generative AI.

PHASE ONE: UNIFY AND ELEVATE DIGITAL CUSTOMER EXPERIENCES

By empowering customers with instant, on-demand access to vast amounts of information and numerous self-service options, the digital transformation *should* theoretically be a pathway to convenient experiences.

Thus far, however, the rise of digital communication has only increased friction. By introducing so many new touch points in silos, brands have made it immensely difficult for customers to seamlessly access the support they are seeking.

“Online help, documentation sites, support portals, case submission forms, communities, chatbots, and other options have made their way to the self-service experience, but for the most part, have been handled as separate channels, with their own content repositories, workflows, etc. This introduces much friction in the customer experience as they don’t have a centralized digital property to engage with a brand’s content. They need to jump through several self-service hoops and will often revert to assisted channels as their self-service journeys were unsuccessful.” - Patrick Martin, Coveo

Beyond creating additional friction, these disconnected digital channels make it impossible for generative AI solutions to deliver relevant, personalized, and consistent communication. Without instant, 360-degree access to customers, their intentions, and their behaviors, AI-powered bots can neither deliver tailored, contextually relevant self-service experiences nor intelligently route customers to the most suitable, best-prepared agents. And without a guarantee that all communication is being generated consistently across all touch points, brands cannot even ensure that their *generic* automated support is accurate and reliable. Customer frustration will continue to rise as trust falls, reducing digital engagement from a source of empowerment into an experiential pain point.

To ready an organization for generative AI, it is imperative to commit to delivering a frictionless, personalized, predictive, and proactive digital experience – and then remedy foundational problems that stand in the way of success.

“You cannot just add GenAI capabilities to all of these different channels and expect amazing outcomes. You need a digital strategy that will bring these channels together, in a unified way, where customers can find the information they need, regardless of the channel used. The journey needs to be connected. GenAI, especially generative answering, will act as the glue that holds everything together, assuming that you have the right technology to leverage the entire enterprise content in a secure fashion.” - Patrick Martin, Coveo

Upon unifying digital channels and deploying generative AI solutions, brands will not simply create easier and more navigable customer journeys. They will also create more intelligent ones, harnessing unified customer intelligence to better identify customers’ intentions, anticipate their future questions and needs, and guide them to more valuable experiences and outcomes.

“Companies that are consistently teaching customers better ways to use their products will inevitably drive more value. Generative AI, when backed with continuously learning ML models, will further these goals by helping to suggest the next question that the customer didn’t know to ask, or the next action they might want to take in a given situation. To achieve this, companies must have a closed loop learning system, where all customer actions are fed back into usage analytics that continue to train recommendations models on customer behavior.” - Devin Poole, Senior Product Marketing Manager, Coveo

PHASE TWO: REMEDY SEARCH INEFFICIENCIES TO UNLOCK GENERATIVE ANSWERING

Unifying digital channels establishes a framework for creating seamless, AI-driven experiences, but it does not guarantee contextually relevant communication. If brands do not address knowledge findability challenges, bots, customers, and agents will struggle to access the most useful content and achieve the most valuable resolutions. In the status quo, the typical contact center faces two crucial findability challenges: knowledge integration and knowledge accessibility.

The first speaks to the reality that many organizations maintain their knowledge across numerous repositories. Beyond making it difficult to locate the most useful information, this fragmentation prevents brands from effectively analyzing knowledge access, evaluating content relevance, and driving the necessary improvements.

“TSIA benchmark shows that support organizations have between 5-12 different repositories where information can be found. Agents spend valuable time searching for information to help them answer questions or resolve issues, and GenAI on its own will have limited gains without the ability to extract relevant information.” - Patrick Martin, Coveo

And while some agents may have “insider tips” regarding which knowledge bases to use or which content is out of date, customers and bots lack that expertise. They are entirely reliant on the information in front of them, and if it is inconsistent or inaccurate, the self-service experience will be ineffective and untrustworthy.

Granted, integrating knowledge into a “single source of truth” is only part of the process. It is also imperative to make the content more accessible. If brands do not account for the search experience, even users who know *where to search* may struggle to determine *how to frame their inquiry* to get the result for which they are looking.

Contact centers can address this challenge by harnessing intelligent search. By enabling users to frame their issue conversationally, such a platform takes away the ambiguity and frustration of the search experience. The brand can then use AI to provide *generative answering*, offering an immediate and relevant response to the inquiry. Both accuracy and efficiency will rise.

For agents, this means the end of putting customers on hold while they fumble through convoluted knowledge bases. It means quickly gaining an answer, and then having the time and mental capacity to *deliver* that answer in a consultative, empathetic, reassuring manner.

“Having efficient search that allows agents to have a ‘one-stop shop’ to find the relevant information can have a significant impact on efficiency and proficiency. Only once this is in place will the introduction of generative AI capabilities have an impact on productivity. Effective search will handle the extraction of the relevant information, and use the LLM to generate an answer that will help the

agent resolve issues faster as they will not have to read through several different documents to write up an answer themselves. Intelligent search and generative answering go hand in hand to truly get efficiency gains.” - Patrick Martin, Coveo

The same benefits will also be available to self-serving customers, although they will benefit from additional, real-time guidance on how to frame their inquiries to get the most relevant AI-generated answers.

“Simplify the user experience by giving customers a comfortable search box interface. However, asking questions to a generative answering solution is different than a search, and so companies must also include some education to help customers with the best ways to build a prompt.” - Devin Poole, Coveo

Not simply about guiding customers through their current interactions, the most customer-centric search experiences help customers better frame future inquiries.

“One key trend we are noticing is about guided experiences. LLM combined with behavioral analytics can be used to create paths-of-least-resistance, where the user is either suggested with what to ask next or asked to refine his question for better results. Such experiences bring an “instant gratification” feel to the sometimes daunting task of information finding.” - Oscar Pere, Senior Director, Service Product, Coveo

While introducing customers to the intuitive usability of generative answering, successful brands will also establish trust in response quality. This includes providing answer citations, sharing additional resources, and welcoming real-time feedback.

“One of the largest concerns is customer trust. If customers do not trust the answers they’re getting, then investment in a GenAI capability is worthless, as they’ll just call/chat or open a case anyway. To combat this, companies must ground their answers in a domain-specific fact base and provide customers with the opportunity to find additional relevant information.” - Devin Poole, Coveo

PHASE THREE: DEPLOY AI WITH THE GOAL OF CONTINUOUS IMPROVEMENT

Reducing digital friction and improving knowledge searching will markedly strengthen today's experiences. Customer centricity is not, however, merely about solving today's problems. It is also about leveraging intelligence to address root causes, anticipate impending needs, and make *tomorrow's* journeys even better.

By cultivating a culture of continuous improvement, brands can truly make the most of the generative AI opportunity. They can truly distance themselves from the competition.

One of the most noteworthy opportunities involves *eliminating* – not simply automating – simple inquiries. If brands understand the most common issues customers are facing and which responses prove most helpful, they can harness generative AI to proactively address these issues. Customers will not even have to engage in lengthy interactions with bots, let alone agents. This will boost their happiness, while improving the contact center's efficiency and capacity for the less predictable, more complex interactions.

"Support organizations continue to receive the same questions over and over again. There are several potential explanations for this (poor knowledge management strategy, bad search, siloed/fractured CX, etc.). With the coming of GenAI in the customer experience, there is an opportunity to leverage these capabilities to increase self-service success significantly, reducing the number of known issues making their way to the contact center." - Patrick Martin, Coveo

"Our initial data shows that CRGA (RAG on enterprise content) is highly successful for how-to and glossary types of questions (up to 60% answer rate), and these questions represent 20-45% of top searches. Enterprises usually have these issues documented, so RAG really does the heavy lifting of turning that content into a meaningful and easy-to-consume answer that helps avoid level-1 cases." - Oscar Pere, Coveo

Along with analyzing common customer issues and intentions, successful organizations will assess customer behaviors during these interactions. How do they frame their inquiries? To which types of communication styles and responses do they most favorably react? Which "fail points" are most likely to prompt them to seek escalation to an agent?

With this data at their disposal, brands can more intelligently refine their knowledge bases and improve search experiences. They can consistently make it easier for customers to find the answers they are seeking, further building trust in AI-generated answers – and further eliminating friction. Solutions exist for applying machine learning to this behavioral intelligence, leading to consistently better and more valuable engagement.

"The Coveo platform leverages many different ML models that are fed by behavioral analytics, and tailored to specific use cases. As users search and engage with content, these events are captured and fed to these various ML models for continuous learning." - Patrick Martin, Coveo

This continuous improvement, moreover, does not simply have to take place at the aggregate level. Brands should also commit to hyperpersonalization, adapting conversation flows, knowledge prompts, and self-service experiences to customers' historical behaviors, as well as their real-time needs and preferences.

"Personalized experiences take other recent interactions with that company into account when providing content and answers. For example, if a customer has already read a document, alerting a CSR to that will help them to personalize that interaction by acknowledging that fact, and asking questions relevant to that piece of content." - Devin Poole, Coveo

As with seamless digital journeys and elevated search experiences, generative AI can play a pivotal role in bringing a vision to fruition. The key is for the brand to commit to that vision, establishing "proactive personalization" and not just "credible responsiveness" as its north star.

FINAL TAKEAWAY: GENERATING DEMONSTRABLE ROI WITH GENERATIVE AI

Generative AI is not an instant silver bullet. Before organizations can harness its potential, they will have to address the fundamental issues impacting their customer journeys, employee experiences, and knowledge management frameworks.

But while success may not literally be a simple click away, it does not have to be difficult. As a recent **Coveo eBook reveals**, journeying through the aforementioned three phases and then deploying an effective, customer-centric generative is a very attainable process for the typical contact center.

That means favorable results are well within reach. **Xero, for example, leveraged its partnership with Coveo to drive a 20% increase in self-service resolutions and a 40% decrease in search time.**



EPOS

Rethinking The Agent Experience in the Age of Generative AI

Only 7% of contact center leaders fear that the rise of artificial intelligence will *definitely* lead to substantial job loss. The reason for their optimism is simple: they subscribe to the notion that the best AI solutions will empower, rather than replace, contact center employees.

Should this vision come to fruition, agents will not simply maintain their relevance in the post-AI world. They will actually become *more important*, taking on higher-value work that plays a more pivotal role in driving customer satisfaction – and, in turn, overall business success.

But while the idea of agents pivoting to higher-value work makes for a great talking point, not all contact center leaders are taking the steps necessary for supporting such a transformation. As a result, they will neither be in position to maximize the return on their AI investments nor cultivate the happy, empowered agents who create satisfied, loyal customers.

What is the *right way* to think about employee empowerment in the era of generative AI? This briefing provides the answer, revealing four lenses for rethinking – and elevating – the agent experience.

IMPROVE HANDLING OF LOW-VALUE WORK

The popular adage that “AI will handle repetitive issues, allowing agents to focus on complex ones” comes with an essential prerequisite: the AI solution has to be *effective* at handling transactional issues. That prerequisite, unfortunately, cannot be taken for granted in today’s customer experience landscape.

Mistakenly believing that simple, repetitive customer inquiries only require basic, impersonal answers, many organizations deploy bots and similar platforms as *information repositories* rather than *self-service solutions*. The experiences simply regurgitate generic information,

offering little in the way of personalization and even less in the way of active resolutions to real problems.

It is due to this reality that only 20% of consumers presently trust chatbots as a valid customer service option – and 95% still rely on agents for some or all issues. As a result, 83% of contact center leaders feel their agents are still spending too much time on simple customer inquiries.

Making matters worse, customers who escalate to an agent *after* an unproductive bot interaction are more likely to be demanding and hostile. The agent is thus not only spending more time on low-value work but enduring a poor experience while doing so.

That poor experience is only compounded by inefficient, disconnected systems that make it hard for them to access relevant customer data and issue context.

Before a contact center can reap the experiential rewards of transferring agents to *high-value work*, it is imperative that they build a framework for successfully resolving repetitive matters. Generative AI can be a vital centerpiece for such a framework.

“Generative AI is a language-based model and is especially good at mining and understanding complex texts and thereby also tasks, questions, and requests. Once a ‘task is understood,’ generative AI can help fill out trivial stuff as part of the documentation, send/share information and as the likelihood of a satisfactory outcome drops with higher complexity, the model can hand over the task to humans.” - Jesper Kock, Vice President of Research & Development, EPOS

STOP OVERSIMPLIFYING “SIMPLE WORK”

When talking about intelligent automation, contact center leaders often focus on the “simple tasks” they want to eliminate. Though their heart is in the right place, it is important for them to be more precise in how they define the work from which they want to free customers.

The goal, after all, is not to actually eliminate simple work; no one wants their life to be more difficult. Instead, it is to make it easier for agents to do more valuable, enriching work. So while removing “simple tasks” like password resets and call logging is essential, so too is the process of *simplifying* all work an agent does within the contact center.

“‘Simpler work’ could also mean, easier, more intuitive, and less frustrating. In EPOS our focus is to make communication easier and less frustrating. Not only in the interaction with Generative AI and the customer, but also ‘interacting’ with the Agents workplace environment.” - Jesper Kock, EPOS

Insofar as 86% of agents spend too much time looking up answers, 75% struggle using knowledge bases, and 74% exert too much effort accessing customer data, it is clear today’s contact center environments are *not simple*.

And as agents transition from answering repetitive questions to complex inquiries that actually *require* them to use customer data and conduct nuanced knowledge searches, the costs of inefficient work experiences will be exponentially greater. No longer mere nuisances, unsupportive systems can have a catastrophic impact on agent performance and customer satisfaction.

By investing in AI-driven solutions for Agent Assist and knowledge management, harnessing the power of customer data platforms, and streamlining approval processes, contact center leaders will create a more frictionless and empowering environment. Agents will be more capable of meeting customers’ ever-growing demands – and significantly happier at every step of the process.

EMPOWER COMPLEX AGENT PERFORMANCE

With inherent humanity and a presumed passion for conversing with customers, agents should theoretically excel at personalized, complex conversations. That theoretical potential for excellence is especially great if a contact center can free them from the administrative tasks and low-value interactions that consume their time and attention.

It is important to remember, however, that an agent’s pivot to a more consultative role is not simply about having innate ability and extra time. It also requires an *environment* that empowers success.

Even if a contact center can address lingering issues regarding slow systems, disconnected databases, and burdensome processes, it still needs a strategy for *coaching* agents on how to engage in more empathetic, consultative interactions. And even if it can develop the appropriate training curriculum, it still needs to put agents in position to harness their high-value skillset.

Specifically, it needs to account for the significant impact of *audio quality*. If agents cannot properly hear customers, they can neither appropriately focus nor sufficiently tailor conversations to their needs. That challenge becomes specifically significant amid the rise to complex work, in which every detail of the conversation matters greatly.

And if customers cannot properly hear agents, they are less inclined to trust that the business cares about efficiently and effectively addressing their needs.

“Communication audio quality is key for complex calls. EPOS research shows the conversation dynamics changes if there are disturbances in the microphone’s voice pickup from the surroundings. Furthermore, the speech clarity, intelligibility and personal characteristics also influence the brain’s perceived ‘naturalness’ of speech in communication.” - Jesper Kock, EPOS

Breakdowns in audio quality also have an impact beyond the initial conversation. Without a completely clear, accurate window into the interaction, the business loses access to the actionable intelligence that comes from the true voice of the customer. Absent this information, the business will have little chance of proactively addressing customer needs, redesigning policies and call flows, or properly coaching and scoring agent performance.

Brands can address this reality by harnessing the power of AI-driven call quality features. When built into comfortable equipment, listening power and agent satisfaction greatly increase.

“In EPOS we use AI to optimize wearing comfort during the design phase. This is key not only for all day wearing but also impacts to a high degree the capability to block out noise. Suboptimal wearing comfort/fit to our ears impacts the capability of blocking out noise negatively. EPOS AI is also the fundamental for the microphone noise reduction performance to work in all use cases and with all phone/communication systems. We know that with EPOS solutions, we can shield the agents and save up to 67% in listening efforts and make them 40% more efficient. They can get tasks done faster with less effort!” - Jesper Kock, EPOS

PRIORITIZE EMPLOYEE FOCUS AND WELLNESS

Everything about the pivot to complex work hinges on the idea that merely providing *better work* leads to satisfaction. It suggests that agents are only a few really fun, engaging calls away from loving their jobs.

It notably neglects the impact that external factors can have not only on agent performance, but on their general wellness and satisfaction.

Background noise throughout the contact center, for example, does not simply prevent the agent from accurately *hearing* everything the customer is saying. It actually has a direct impact on their ability to focus, leading to drains on performance and agent sentiment. If happy agents are the key to a successful contact center, insufficiently accounting for these wellness and focus risks is a certain path to failure.

Not simply theoretical, the impact noise attenuation has on focus and performance has been supported by a clinical study.

The Benefits of EPOS Noise Attenuation



"The clinical study* presented in this whitepaper evaluated the potential benefits of noise attenuation in audio devices, while people performed a dual task consisting of understanding speech while reacting as fast as possible to a visual task. The goal was to evaluate how noise attenuation affects speech-in-noise recognition, listening effort, reaction time, accuracy, and overall cognitive resource allocation in a dual task paradigm." - Jesper Kock, EPOS

TAKE ACTION TO SUPPORT THE NEXT-GENERATION AGENT EXPERIENCE

To create the happy, empowered, focused agents who can not only cultivate customer happiness but also handle an increasingly complex array of tasks, it is imperative to take meaningful action with regard to the agent experience. EPOS' AI-driven solutions represent a particularly powerful opportunity.

For more on the BrainAdapt study, [click here](#)

For more on EPOS' solutions, [click here](#)



Why Generative AI is the Key to Embracing Change and Elevating Customer and Employee Engagement

The only constant is change. For the contact center, that unfortunately means that the only constant is challenge.

“Most contact centers are highly efficient as long as there are no significant changes—such as updates to products, procedures, internal processes, or other types of organizational changes. However, when changes occur, it takes considerable effort to communicate and process all these changes.”

- Harold Huber, Managing Director, USU

As customer inquiries become more complex and customer demands become more intense, the propensity for change will only grow. Customers will increasingly frame unpredictable requests in unexpected ways, all while seeking more unique and tailored support from

both chatbots and live agents. If contact centers remain unequipped for this more dynamic approach to service, inefficiencies will grow as customer satisfaction falls.

This, of course, says nothing about the additional frustration facing agents. As they struggle to keep up with new processes, new products, and new customer demands, their sentiment and satisfaction will suffer. And, as the contact center community knows all too well, the less happy the agent, the less happy the customer.

Fortunately, solutions to the problem of constant change are now at the fingertips of contact center leaders. Generative AI-driven technology enables brands to adapt to change and create new, unified content in real-time. The result will be more relevant, engaging, conversational, and consistently high-quality experiences for customers and more empowering, motivating environments for agents.

“GenAI joining forces with USU Knowledge Management represents a breakthrough in boosting content management productivity, a critical advantage for contact centers where vast amounts of content are both produced and utilized.”
- Harold Huber, USU

What unprecedented opportunities will generative AI unlock? What strategic factors must brands consider to make the most of this exciting new technology? This briefing provides the answer, before concluding with a look at real-world success stories.

GENERATIVE AI | PERSONALIZING THE SELF-SERVICE EXPERIENCE

Despite lamenting long hold times as their #1 pain point, 95% of consumers continue to wait for live agent support. The reason? They do not trust self-service options.

Whereas 70% of consumers trust live phone agents to solve their problems, only 20% have similar confidence in chatbots. Having endured too many impersonal chatbots that neither adapt to the context of their situation nor enable them to engage in an organic manner, consumers simply have no faith in today's self-service. As a result, they look for every opportunity to avoid bots, even if it means exerting more effort, enduring more waiting, and answering more repetitive questions en route to a live agent.

Fortunately, generative AI-powered self-service can alleviate these issues. By developing real-time content that is *personalized* to a given customer and *relevant* to the context of their issue, the technology transforms self-service from a static deflection tool into a pathway to convenient resolutions even as customer needs and expectations evolve.

“GenAI transforms self-service communication by supporting a diverse range of user personas. Unlike static FAQs, it offers the flexibility to provide brief answers initially, with the option to expand details based on the customer's questions, ensuring a more personalized and responsive user experience.”
- Harold Huber, USU

Best of all, the solution will be generating responses from a single, ever-improving source of truth. This enables brands to offer a more dynamic, tailored experience without the risk of sharing inconsistent information with the customer.

By providing a more robust self-service experience, generative AI will achieve numerous critical goals for today's contact centers. First, self-service containment rates will markedly rise, leading to higher customer trust and greater operational efficiency. Customers will *actually* use bots for many issues, enabling agents to shift to more meaningful work (and be *more readily available* for the customers who require their assistance).

Plus, even if the bot cannot fully solve the problem, the more conversational experience will invite customers to actually attempt to engage with the bot – as opposed to immediately asking for a representative. This additional engagement will help brands uncover customer intent and sentiment, yielding better experience design *and* more productive hand-offs for those who do ultimately escalate to an agent.

GENERATIVE AI | EMPOWERING AGENT EXPERTISE

Roughly 4-in-5 contact center leaders feel agents spend too much time addressing repetitive customer issues. Nearly 3-in-4 feel they spend too much time looking up knowledge about the issues they are addressing. When implemented correctly, generative AI can address both sources of agent effort.

By strengthening the chatbot experience, AI-powered self-service will enable customers to enthusiastically handle many issues on their own, preventing repetitive issues from reaching live agents. Of course, the transition to more complex work will only heighten the importance of agent empowerment. After all, if agents are already spending too much time looking up the knowledge to support simple issues, how will they efficiently handle more challenging and unpredictable work? How will they do so while adapting to constantly changing customer demands and ever-evolving corporate policies?

“Ensuring agents have access to a unified knowledge base instead of multiple silos is crucial. With a centralized repository, agents can swiftly access any information they need, enabling them to address inquiries promptly and efficiently. This approach not only streamlines the support process but also empowers agents to deliver top-notch assistance, especially when tackling complex issues. By prioritizing comprehensive support over mere ‘tips,’ we guarantee effective resolution of our customers' needs, bolstering their satisfaction and loyalty.” - Harold Huber, USU

Fortunately, agent-facing AI can elevate knowledge relevance and accessibility in numerous ways, thus creating a culture of true empowerment within the contact center.

“GenAI will revolutionize the entire process of how knowledge is handled within organizations.” - Harold Huber, USU

First, generative AI can play a vital role in training and development. Just as it can foster engaging self-service experiences, generative AI technology can create more personalized, relevant, and multimedia training material that agents will more enthusiastically internalize. Ramp time will decrease as retention markedly increases.

Once on the job, agents will also benefit from generative AI-driven knowledge content. Instead of relying on static, dated, inconsistent entries with limited maintenance or oversight, agents will be able to easily search and access information that is conversational, relevant, accurate, and *constantly updated*. AI-powered knowledge will dramatically reduce search time while massively elevating the quality of the content.

In fact, searching may not even be necessary. Leading AI solutions leverage the power of agent assist, surfacing relevant, actionable knowledge based on the real-time context of the conversation. This will enable agents to provide quicker support and engage in more “human” conversations with customers, all with reduced risks of inaccuracies or inconsistencies.

“Previously, customers might have received different answers from different agents, self-service platforms, or chatbots. With GenAI, there is potential for significantly improved quality, as the same content is used to generate answers, ensuring consistency across all customer service.” - Harold Huber, USU

KEYS TO FOSTERING AI TRANSFORMATION

Whether by elevating the self-service experience or empowering agent performance, the benefits of generative AI are glaringly obvious – and readily attainable. Leading solutions are *already* using the technology to create more adaptive and personalized customer and agent experiences.

The benefits are not, however, automatic. Without addressing some vital considerations, brands will fail to enjoy the full power of generative AI.

Establish limits for self-service

Generative AI-powered bots can deliver personalized, unscripted resolutions to customer issues. Cognizant of this reality, it is imperative for brands to consider the boundaries of the self-service experience.

What kinds of resolutions and make-goods would be too excessive to provide in a self-service context? What kinds of customer data and inquiries would be inappropriate (if not unsafe) to manage in a chatbot? What risks of inaccurate communication are present, and when would the cost of those risks be too high?

By answering these questions, brands can safeguard their bots, ensuring they provide resolutions when logical while escalating customers to agents when vital.

Rethink knowledge management

Generative AI can play a pivotal role in creating, consolidating, and democratizing knowledge content. The success of these efforts, however, hinges on the business establishing an effective knowledge management strategy.

Harold Huber of USU highlights three steps for building the appropriate knowledge framework:

“First, identify the relevant knowledge within your organization by determining what knowledge is available and what is pertinent. Next, outline the processes surrounding knowledge management, including when knowledge is created and when it is needed. Finally, specify the use cases where knowledge is applied and automate these processes, ensuring that a quality assurance procedure is established.”

While reviewing knowledge processes, it is also important to ensure that core knowledge content is written with generative AI in mind. The technology has to be able to *understand the intent and nuances* of knowledge before it can create subsequent entries and/or provide real-time, contextual guidance to agents and other stakeholders. If there is any lack of understanding, inconsistencies and inaccuracies may emerge.

Prepare agents for more consultative engagement

By eliminating transactional tasks and arming them with more actionable, real-time intelligence, generative AI theoretically empowers agents to engage in more personalized, consultative conversations with customers. These benefits, however, hinge on the idea that agents are ready to meet this higher standard of work.

“Merely using available content and GenAI as a technology carries the risk that calls and agent assistance will generate dialogues that may not be truly helpful.” - Harold Huber, USU

Fortunately, the overwhelming majority of leaders understand this reality. Nearly 84%, in fact, say they need to train agents on using AI-powered prompts and guidance as a springboard for more personalized and empathetic interactions.

The key will be to develop the right training and performance management strategies, using workflow optimization, modern quality scoring, AI-enhanced lessons, and real-time guidance to help agents shift from **reading scripts to using enhanced knowledge to form lasting customer connections.**

SUCCESS IN PRACTICE

Collectively, the considerations underscore the importance of finding the right technology partner. If contact centers want to *successfully* adapt to ever-evolving customer demands and ever-changing employee needs, they require support from a partner that not only offers innovative AI but knows how to build the appropriate knowledge framework.

USU fits this bill, helping organizations establish unified knowledge centers that support accurate, scalable, customer-centric AI content creation.

“All the information that Gen AI uses needs to be clear, concise, and up-to-date. USU KM actually uses AI to help achieve this, enabling businesses to identify gaps, inaccuracies, and inconsistencies in their data. Essentially, USU leverages AI to help AI work better.” - Harold Huber, USU

Not simply theoretical, the benefits of USU’s approach are being routinely proven in practice. Example success stories follow.

Company: Gisa

Challenge: Help internal users with their IT problems

Solution & Result: A GenAI chatbot uses internal and external knowledge about “how to help with IT problems”. If no internal instruction is available external knowledge is used.

Company: Union Investment

Challenge: Use of Data inside of Knowledge Center together with other data outside via a vector based search

Solution & Result: Using the USU KCenter Index hook the vector index was kept up to date and knowledge Center could be integrated in the data used in the vector search.



2024 Contact Center Decision Makers' Guide

Agent Engagement & Empowerment

How contact centers are engaging and empowering agents to improve morale, decrease attrition, and improve the customer experience.

In the dynamic landscape of contact center operations, this installment of the 2024 US Contact Center Decision-Makers' Guide stands as a beacon for transformative strategies in agent engagement and empowerment. Rooted in comprehensive research and actionable insights, this report dives deep into leveraging a combination of technology and agent enablement to boost morale, reduce attrition, and elevate customer interactions—illuminating a path for decision-makers to improve the customer experience directly from the frontlines.

By fostering an environment of agent enablement, skill development, and empowerment, leaders can create a thriving ecosystem where agents are empowered and customers satisfaction reaches new heights.

EMPOWERING CALL CENTER AGENTS WITH VOICE AI

Voice is the foundation of effective call center communication, and the quality and comprehension of voice communication can make or break a customer experience. Despite substantial investments in speech and accent neutralization training, many listeners have difficulty comprehending offshore agents.

Conventional solutions are time-consuming, expensive, burdensome, and the result is often the same: inefficient communication, increased handle times, and CSAT erosion, with agents left feeling morally taxed.

Fortunately, innovative technologies are enabling contact centers and empowering agents with bespoke solutions to improve productivity, challenge biases, and equip agents to do their best work, globally.

Contact center technology is much more than a productivity booster, it's a crucial ally in the journey toward an equitable, empowered workspace.

Accent Localization: A Catalyst for Global Talent Acquisition and Retention

The ripple effect of accent localization on talent acquisition and retention is significant. Call centers can tap into the potential of a global workforce, assured that different native languages are not barriers to communication—focusing more on skill sets and capabilities than linguistic sameness, talent pools widen and employee retention improves.

Celebrating AI's Transformative Role in Agent Empowerment

Voice AI has become a game-changer in helping call centers scale operations, improve efficiencies, and advance DEI and agent belonging. Through innovations like **AI Accent Localization**, PII-redacted Call Center Transcriptions, and noise cancellation software, Krisp enables agents globally to improve productivity and achieve new heights.

Tech-enabled call centers are empowering employees to unleash their full potential, all while boosting the organization's ability to scale, innovate, and adapt in a diverse global market.

And that is a future worth investing in.

ABOUT KRISP

Krisp helps call centers worldwide to maximize the impact of every digital voice conversation. Krisp customers experience:

8%

increase in
CSAT scores

30%

reduction in
cost

78%

decrease in
noise complaints

25%

increase in
agent CSAT

10%

reduction in
AHT

16%

increase in
sales conversions

"Krisp's technology supports our vision of leveraging AI to deliver better experiences for our clients' customers. Our group is committed to driving grounded innovation through partnerships that empower CX improvement, and Krisp is a valued partner on this roadmap."



Olivier Camino
Global COO at Foundever



AGENT ENGAGEMENT AND EMPOWERMENT

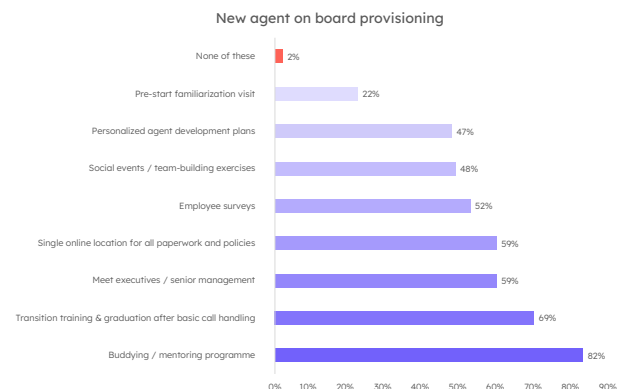
Engaging the new agent

An agent joining a new organization has a lot to take on board – culture, systems, expectations, new products and services – and this becomes even more difficult if this is the first time that the agent has worked in a contact center environment. Businesses have numerous ways of introducing (or 'onboarding') new agents to their work, shown in the following chart.

Most respondents have a buddying / mentoring program, and some form of official 'graduation', easing new agents into the real work after basic call handling training. Social events and senior management introductions usually feature highly, and while the pandemic reduced the opportunity for these, around half of respondents now do so. 50% provide individual agent training and development plans.

52% of respondents seek 360-degree feedback from new agents (which would provide vital information about the reality of the agent onboarding process that could be used for improvement), and 59% offer a single portal containing all of the paperwork and internal administrative tasks that a new employee requires. Only 22% have pre-start familiarization visits: a considerable drop from pre-pandemic figures, perhaps as so many agents are now based at home.

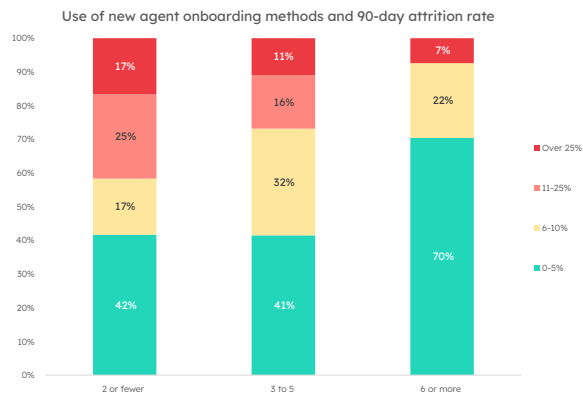
Figure 1: New agent on-board provisioning



It is hypothesized that high levels of agent onboarding and support would reap benefits through lower new agent attrition levels, as agents receiving more onboarding support in their first few weeks should adapt to the work and culture more quickly, become more confident and feel more empowered. The chart below shows three ranges of new agent attrition – 0-10%, 11-25% and 25%+ – and investigates how many types of onboarding method were used by respondents within each group.

The chart below does seem to show as though there is a positive correlation between the number of onboarding methods used and having lower 90-day attrition rates.

Figure 2: Use of new agent onboarding methods and 90-day attrition rate



Engaging The Experienced Agent

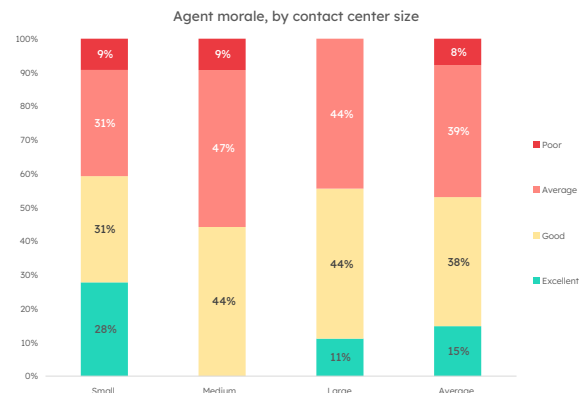
Motivating and keeping good agents in a working environment that is often stressful, sometimes repetitive and usually not particularly well-paid is a challenge the contact centers have had to face since their inception. As the nature of contact center work becomes increasingly complex, and customers' expectations of what constitutes good quality service becomes ever higher, the agent's job is now rarely just reading something off the screen: they have to be empathetic to the customer, use their initiative to solve the issue and remain focused on answering the next call just as effectively.

When considering how attrition and absence issues can be alleviated, bonuses and incentives are generally felt by most businesses to be a possible solution.

Agent Morale

Agents with low morale engage with customers less, provide lower quality work, take more unauthorized absences and end up leaving the company. Improving morale is good for business, and also good for other agents and the entire working environment: no-one wants to go to work in a miserable place.

Figure 3: Agent morale, by contact center size



Looking at the previous chart, it seems that contact center morale is generally seen to be less positive than last year, when 69% of respondents stated that their contact center enjoys "Good" or "Excellent" morale. This has declined to only 53% this year, with mid-sized operations being especially downbeat about this.

Eight options to improve morale were set before respondents, who were asked to pick the top three that they thought were most likely to improve morale (although this question does not ask the agents what they themselves think of this). Although the most popular no.1 choice – higher pay – may not be a realistic choice for most contact centers, there is a correlation between salaries and attrition (and by extension, morale). Past research has shown that contact centers with less than 10% attrition within the first six months pay new agents an average of 10% more than those contact centers with a short-term attrition rate of over 25%, a pattern that is consistent over the years.

Giving agents the empowerment to make decisions that help customers is seen as having a positive effect on morale: empowerment – the support provided by the systems, processes and organizational culture required to help an agent solve the customer's query – is closely linked first-contact resolution, which as we have seen is key to customer satisfaction. First-contact resolution rate directly impacts upon morale: if agents are unable to help customers, they become discouraged which leads to higher levels of agent attrition and absence, as well as a greater number of callbacks and call transfers, which impact negatively upon contact center cost, performance, quality and customer satisfaction.

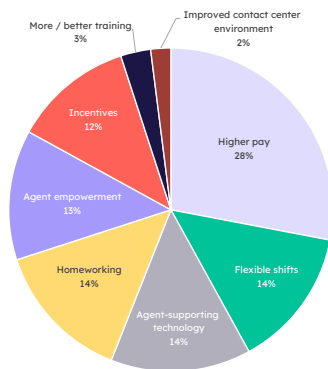
So how can agents become empowered?
A few elements are:

- System support to answer any query, with access to the customer's history across every channel
- Desktop applications that provide all of the relevant information in one place – regardless of the channel the customer has used – without requiring agents to hunt it down
- Intelligent support to suggest answers to agents, and make sure that they comply with regulations and achieve the quality controls set by the business
- Recurrent queries are identified and answers disseminated via knowledge base / alerts
- Skills and capabilities, via ongoing training
- Trust and culture from senior management, including giving agents the time they need to handle the query without excessive pressure to meet internal metrics at the expense of solving the customer's issue.

Respondents were also of the opinion that improving the technology available to support agents would make a positive impact upon agent morale. Solutions such as knowledge bases, dynamic scripting, a 360° view of the customer and a single unified desktop also empower the agent to deliver a successful resolution first time.

Figure 4: What's the single most important factor that would boost agent morale?

What's the single most important factor that would boost agent morale?

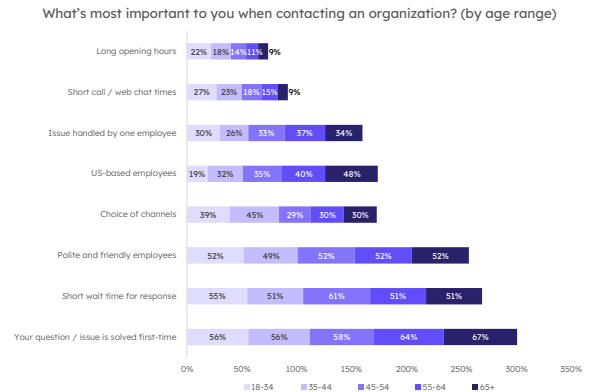


Accent Localization

Many US companies use offshore talent pools for customer contact, whether directly inhouse or through an outsourcer / BPO. While this can have a positive impact on cost and service availability, it is not universally popular with customers.

The chart below shows the importance to customers of various factors when contacting an organization. While having US-based employees is not the most critical factor, a significant proportion of customers state that it is in their top three considerations impacting their CX: in fact, this is the case for 48% of the over-65 year-olds surveyed.

Figure 5: What's most important to you when contacting an organization? (by age range)



One of the major issues with offshore agent contact is incomprehension caused by unfamiliar accents, which can lead to immediate negativity, particularly if the issue is a complaint or problem in which the customer is already in a adverse frame of mind.

Quite apart from a poorer customer experience, this has an impact on agent engagement and morale: with agents taking or making over 100 calls per day, regular criticism of their accent and comprehensibility will quickly have a cumulative negative effect on their mindset, productivity and selfconfidence which becomes a problem for everyone.

The historical method of alleviating this problem is to put agents through accent neutralization training, which is often mixed with cultural training to establish a more Western way of call handling. Apart from the mixed results that such training delivers, this is a very significant onboarding cost for businesses to bear and can be demeaning for agents. It also impacts on agent productivity, as they are required to take ongoing refresher courses which takes them off call handling.

While there are cultural and sociological arguments to be made that offshore agents should not have to change their own accents to pander to Western society, the reality is that from a communication perspective it makes sense for each side of the conversation to be mutually comprehensible. Furthermore, if unfamiliar accents cause difficulty for customers, studies have shown that companies will be more likely to move their business to more accent-neutral locations.

Issues with poor accent comprehension include:

- Agent and customer frustration
- Lower agent morale and increased attrition rates
- Reduced CSAT and CX
- Longer call times
- Risk of inaccuracy and miscomprehension
- Reduced available talent pool.

Accent localization solutions have recently come to market which leverage AI technology to produce real-time inflection and modulation changes to help customers understand agents better by dynamically changing agents' accents into the customer's natively understood accent. The solutions are easily implemented and require no training time for the agents, reducing onboarding effort and training cost and should help to alleviate any customer negativity around speaking with non-US agents.

OVERCOMING LANGUAGE BARRIERS BETWEEN AGENTS AND CUSTOMERS

Voice is the foundation of effective call center communication and the quality and comprehension of voice communication can make or break a customer experience. Despite substantial investments in speech and accent neutralization training, many listeners have difficulty comprehending offshore agents.

Conventional solutions are time-consuming, expensive, burdensome, and the end result is often the same: inefficient communication, increased handle times, and CSAT erosion, with agents left feeling morally taxed.

Introducing AI Accent Localization

Utilizing real-time inflection changes, **AI Accent Localization** helps customers understand agents better by dynamically changing agents' accents into the customer's natively understood accent. This scalable, out-of-the-box solution works across 100s of communication platforms and, with the click of a button, empowers agents to focus on conversations rather than speech, to communicate more effectively.

Agent Performance

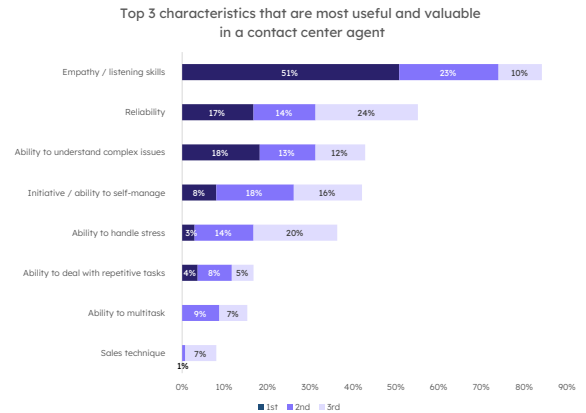
Survey respondents were asked to rate the attributes that they believed were most useful and valuable in contact center agents.

By far the most important factor was empathy – the ability to listen, understand and help customers – which was placed in no.1 position by 51% of respondents. Of course, empathy is only really useful when the supporting systems and processes allow and empower the agent to handle the interaction as they need to: there is no use in valuing empathy in an agent if they are not permitted to spend the time required to fulfil the customer's request, or the systems prevent them from achieving their goal.

An ability to understand complex issues is also very valued, and will continue to increase in importance as self-service handles more of the straightforward customer requests, leaving more complex and tricky work for human agents (it's worth noting that this factor was ranked only 5th most

important in 2014). Initiative and self-management are also seen as important, and are of particular value in remote working environments where self-starting is an asset, and where outside help may be more difficult to access.

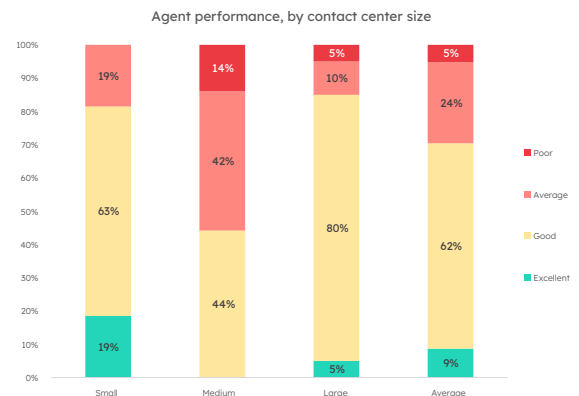
Figure 6: Top 3 characteristics that are most useful and valuable in a contact center agent



Looking at agent performance, survey respondents in mid-sized contact centers are most likely to feel that there is room for improvement.

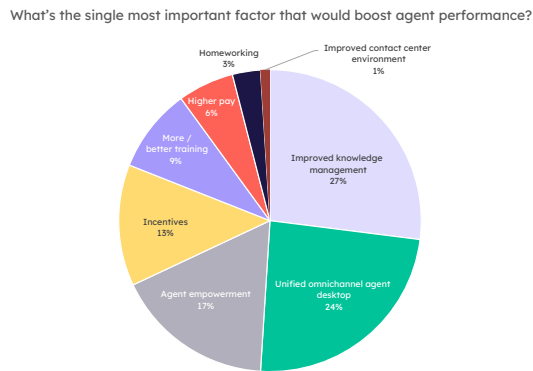
Only 9% of those surveyed felt that their agent performance was "Excellent", although 62% felt that it was "Good".

Figure 7: Agent performance, by contact center size



As with agent morale, respondents were presented with a list of factors that could improve agent performance and were asked to give their top three.

Figure 8: What's the single most important factor that would boost agent performance?



Empowering agents to make decisions that help customers – which increases first-contact resolution rates – was once again an important factor in increasing agent performance. As respondents also stated that this would improve agent morale, contact centers should focus upon the tools, processes and culture that supports agent empowerment. Improved knowledge management applications – the most popular top 3 factor – help with this, as they attempt to provide the agent with the information required to solve the customer's request while on the call, rather than requiring call transfers or callbacks.

A unified omnichannel agent desktop, providing agents with all of the information that they require on a single screen, also empowers agents and help solve the customer's issue first-time.

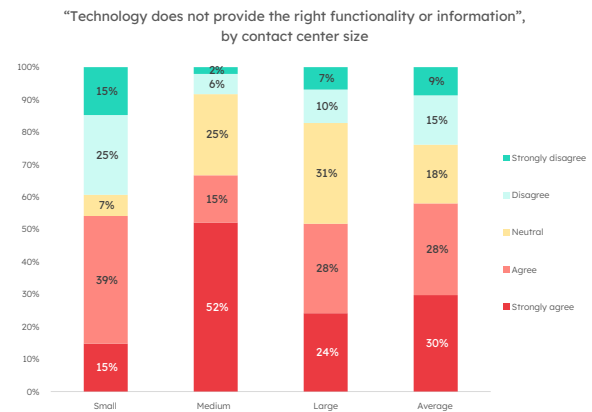
Higher pay, despite being viewed as a major boost to morale, was not seen as an effective way to increase performance: keeping the same staff, technology and processes while paying agents more won't make any major difference to performance. Incentives were also viewed as improving morale rather than performance, although they are useful in particularly high attrition environments such as many of the largest contact centers and those running outsourcing operations.

What's Holding Back Agent Empowerment?

Being seen as one of the keys to both morale and performance, agent empowerment – the ability to make the decisions and carry out the actions that would actually help customers – requires the business to trust the agent to do the job to the best of their ability, supporting them through culture, process and technology as needed, and is closely linked with first-contact resolution, which as we have seen elsewhere in this report is key to customer satisfaction.

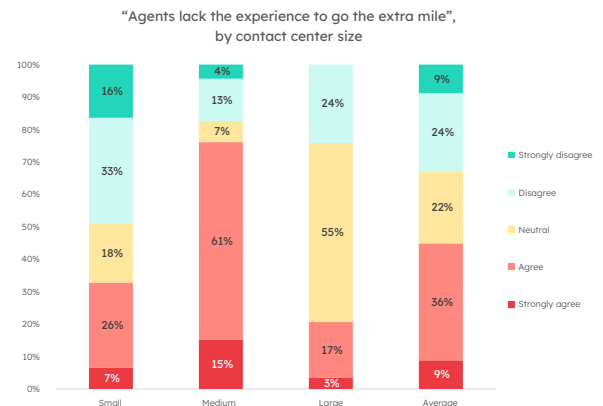
Survey respondents were asked what was holding back agent empowerment: by far the most important factor was that the technology used does not deliver the required functionality or information, preventing even the most capable and empathetic agent from reaching their potential, with 58% of survey respondents agreeing that this was the case.

Figure 9: "Technology does not provide the right functionality or information", by contact center size



45% of respondents agreed that some agents lacked the experience to be truly empowered to help the customer, which is considerably higher than normal and is driven by the mid-sized contact center responses.

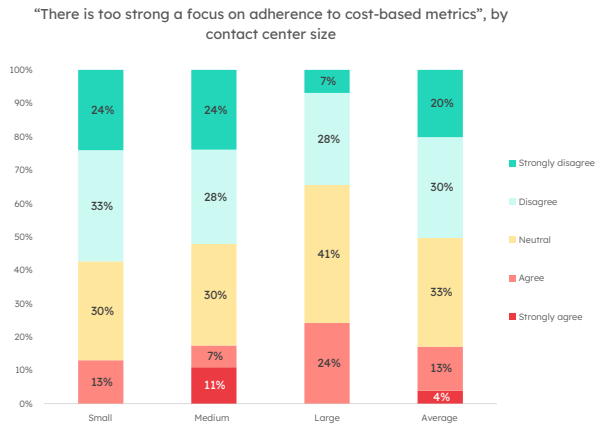
Figure 10: "Agents lack the experience to go the extra mile", by contact center size



Only 17% of survey respondents blamed the contact center's internal focus on hitting metrics such as call duration and throughput for holding back agent empowerment.

Sub-optimal technology is certainly seen as the major culprit for a lack of agent empowerment, but some operations' concern about the skill-sets of their agents should also be noted, and solutions to this sought.

Figure 11: "There is too strong a focus on adherence to cost-based metrics", by contact center size



Aligning The Agent With The Business

It might reasonably be expected that the agent engagement/reward program will directly support those characteristics and achievements that are most highly valued by contact centers and businesses: specifically, customer satisfaction, attendance and punctuality, and customer service-focused metrics such as first contact resolution rates.

The following table shows this more clearly. The agent characteristics and achievements that are **encouraged and required** are shown, in order of importance, on the left (ranked by the greatest number of top 3 positions). The characteristics and achievements on which **rewards are actually based**, are placed on the right (ranked by the highest proportion of respondents stating that the characteristic was 'greatly' or 'somewhat' rewarded).

Figure 12: Comparison between characteristics encouraged, and characteristics rewarded

| Rank | Agent characteristic encouraged | Agent characteristic rewarded |
|-----------------|--|--|
| 1 st | High CSAT / customer feedback scores | Good attendance and punctuality record |
| 2 nd | Good attendance and punctuality record | High adherence to schedule / availability |
| 3 rd | Other service metrics (e.g. first contact resolution rate) | Other performance metrics (e.g. short average handle time) |
| 4 th | High adherence to schedule / availability | High CSAT/customer feedback scores |
| 5 th | Sales / conversion rates | Other service metrics (e.g. first contact resolution rate) |
| 6 th | Other performance metrics (e.g. short average handle time) | Sales / conversion rates |
| 7 th | Other financial metrics (e.g. high % of promise to pay) | Other financial metrics (e.g. high % of promise to pay) |

It would be expected that the most encouraged and desired characteristic would be that which was also the most important when considering how to reward agents: in this way agents would be rewarded closely based upon how much their performance aligned with the needs of the contact center and the business.

However, this is only partially the case. For example, although high customer satisfaction scores are stated to be the most important, it is only placed fourth in terms of characteristics rewarded.

On the opposite side, operational performance service metrics such as average handle time are seen as only the sixth-most important to be encouraged, but rated as the third most important characteristic to be actually rewarded. In this way, we can see that the characteristics needed and characteristics rewarded are somewhat disconnected, putting them out of alignment with the needs of the wider company.

However, the importance of good attendance and punctuality is both recognized and rewarded appropriately. The difficulty in keeping agents engaged, understanding and focusing upon the behaviors, actions and characteristics that are most helpful for the contact center and the business, and the limited budget which most contact centers have for incentive programs create a situation whereby an alternative approach may need to be considered.

Gamification is an approach taken to improving agent engagement, aligning behaviors and characteristics with those of the contact center and wider enterprise: at the most basic level, it involves making work tasks into games. The contact center is a particularly rich potential environment for this approach, as it contains many of the factors that can make gamification successful:

- opportunity for achievement, reward and recognition at an individual level
- the possibility of team-based and goal-based quantified success
- a large pool of competitors and team members, that can be segmented appropriately to make competition and teamwork more manageable
- clearly defined tasks and metrics that can enable direct comparison between individuals and teams, over time, with measurable improvements possible.

Bringing it all together

It is clear that the agent engagement and empowerment journey is ongoing. The insights shared here are not just recommendations but foundational elements for building a future where contact centers

excel from the frontlines, elevating the customer experience to new heights. Let this guide be a catalyst, marking the beginning of a new era in CX excellence.

ABOUT THE US CONTACT CENTER DECISION-MAKERS' GUIDE

The "US Contact Centre Decision-Makers' Guide (2024 – 16th edition)" is the major annual report studying the performance, operations, technology and HR aspects of US contact center operations.

Taking a random sample of the industry, a detailed structured questionnaire was answered by 189 contact center managers and directors in October and November 2023. Analysis of the results was carried out in November & December 2023. The result is the 16th edition of the largest and most comprehensive study of all aspects of the US contact center industry.

This White Paper is taken from the "Agent Engagement, Empowerment & Gamification" chapter of the report, sponsored by Krisp.

The whole report is available free of charge from **ContactBabel**.

ABOUT CONTACTBABEL

ContactBabel is the contact center industry expert. If you have a question about how the industry works, or where it's heading, the chances are we have the answer.

We help US and UK contact centers compare themselves to their closest competitors so they can understand what they are doing well, what needs to improve and how they can do this. The coverage provided by our massive and ongoing primary research projects is matched by our experience analyzing the contact center industry. We understand how technology, people and process best fit together, and how they will work collectively in the future.

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CRESTA

3 Steps for Amplifying Best Practices with Gen AI

Expectations for contact center agents are higher than ever before. As customers continue to expect more out of their favorite brands, the pressure to deliver exceptional and personalized support often falls on the agent.

The challenge, however, is that most agents today are not necessarily equipped to navigate these rising expectations. Even as organizations work to optimize processes, the agent experience is consistently complicated by legacy technology and time-consuming, manual workflows that simply cannot keep up with the evolving customer dynamics.

Generative AI offers a solution to many of these concerns; by streamlining operations and reducing the cognitive load, many contact center leaders see it as the necessary next step to improving performance and enhancing outcomes. While there have been discussions of new tools like generative AI replacing the need for agents altogether, 77% of leaders in the space believe that this AI technology will not impact headcount, but rather, shift the agent's workflow for good.

As an augmentation tool, generative AI gives organizations the opportunity to not just improve interactions but set a new standard for support success. Tim Shi, Co-Founder and CTO at Cresta shares, "With generative AI, leaders can see a holistic view of the outcomes-driven behaviors that top performers are doing that drive exceptional customer experiences, higher conversions, and improved sales. This increase in consistency makes all performers top performers."

With generative AI, organizations can standardize best practices and give agents the opportunity to exceed expectations in every interaction. Further, it will give leaders the resources to better understand performance and identify coaching moments to prepare agents to take on a more complex workflow.

Generative AI has the potential to revolutionize the contact center, not only in increasing accuracy and speed, but also by giving customers access to a more informed, analytical, and confident frontline.

Here we outline the necessary next steps to leveraging generative AI as a mechanism for achieving high-quality standards and best practices across the customer experience.

STEP 1: IDENTIFYING TOP CHALLENGES TO THE NEW CX STANDARD

To amplify best practices and prepare agents to deliver exceptional support, leaders must recognize and remove the main barriers of the current agent experience. Although leaders want agents to take on more and build their expertise, they cannot sufficiently do that with the current roadblocks in their day-to-day workflow.

Repetitive Tasks and Chronic Inefficiencies

To take the next step in building a team of top performers, leaders must take a deeper look at their agents' individual workflows and pinpoint major inefficiencies. By taking stock of these moments of complexity, leaders can work to improve interactions and enhance their agents' abilities.

This is a concern for many leaders in the space; 83% of contact center executives say that the typical agent still spends too much time on simple and repetitive customer interactions, according to CCW Digital research. All of this wasted time is not only a problem for efficiency, but also for the customer experience. If agents are spending so much of their time on low-value work, they are likely disconnected during their interactions and struggling to focus on the customer's concern.

These small inefficiencies can have a major impact on contact center operations and the overall customer experience. When using generative AI, however, agents can streamline many of these repetitive tasks and begin to work toward a more personalized-style of support.

QA and Coaching Limits Performance Visibility

To amplify best practices, contact center leaders must work to outline key indicators for success in the role. The more leaders understand about performance and the greater visibility they have into their agents' challenges and successes, the easier it will be to emphasize and train these skills moving forward.

In the past, this level of visibility into performance has been difficult to achieve. Leaders had to listen to calls manually and unpack key learning and performance pain points. This was helpful, but only offered a glimpse into the agent's workflow. Tim Shi, Co-founder and CTO of Cresta states, "With such a manual process, managers have little data with which to decide which agents to coach and how to coach them. With generative AI, managers gain 100% visibility into agent performance and can deliver the necessary and personalized training as their team needs it."

Generative AI can help automate this process to give a 360 degree view of the agent's performance. Even the most minute moments will come to light, giving leaders a true understanding of what makes or breaks an interaction for the agent and the customer.

The Speed of Knowledge Retrieval

Exceptional experiences hinge upon accuracy, speed, and personalization. All of these qualities are driven by effective knowledge management and retrieval. However, this is often a challenge for the typical contact center agent. According to CX leaders, 73% of agents are taking an excessive amount of time looking up knowledge about the issue they're addressing.

Without this knowledge in real time, agents appear distracted during customer interactions. It also takes them far longer to meet customer expectations and build their expertise. By slowing down the knowledge retrieval process, organizations are adding time to the training process and preventing agents from becoming true experts.

Generative AI can support a quicker ramp-up time and inform experiences, acting as a co-pilot for the agent. By surfacing insights instantly, agents can avoid inefficiencies and optimize their performance seamlessly.

STEP 2: OUTLINING WHO SETS THE 'TOP AGENT' STANDARD

To amplify best practices, CX leaders will have to first understand what traits and skills set top performers apart. Without deep insight on how agents are excelling, organizations will never be able to replicate these exceptional interactions.

Further, knowing exactly what customers expect out of interactions and acting upon this feedback to inform training and development will also be critical as we see expectations continue to rise.

Empathy and Conversations over Transactions

In today's digital environment, customers are used to seamless and quick transactions. They are used to self-serving, comfortable engaging with a chatbot, and familiar with innovative technology. When they choose to speak with an agent, the human aspect of the conversation becomes much more important.

Tim Shi shares, "Customers expect agents to empathize with their concerns and provide personalized solutions. Agents must hone their interpersonal skills and bring a high EQ (emotional quotient) to build loyalty and trust with customers, even - or perhaps especially - in challenging situations."

Empathy has become key in these agent-led interactions. In fact, according to CCW Digital research, 88% of leaders are working on training their agents on soft skills and empathy to achieve stronger human connections with customers.

As tools like generative AI free up the agent to spend more time with the customer, agents will need to build up empathy and emotional intelligence to give customers the most comprehensive support.

Problem-Solving and Multi-Tasking Will Be Necessary

If agents are no longer sticking to a script and navigating high-complexity interactions, they will require a more analytical approach. Giving agents all of the insight and resources they need to become a problem solver is the necessary first step, but ensuring they are able to use this information to build a better experience is also important.

Agents will need to identify the root cause of issues and read intent as they enter into every interaction. As generative AI delivers the context and history of every interaction, agents will be poised to use this information to enhance the interaction and improve outcomes. By analyzing key information and leveraging problem-solving skills, customers will feel confident in interactions, knowing the agent will do everything they can to resolve their concern.

This ability to handle more complex and unique customer inquiries was rated the #1 most essential skill for agents moving forward in CCW Digital's latest market study. Organizations should be taking the time now to ensure their team is prepared to engage in this level of work. Hiring, training and supporting agents for this new journey will be critical moving forward.

Embracing Innovation and Technology

While the agent experience has undoubtedly been complex, it is likely to become even more sophisticated as organizations implement new technology. The willingness and adaptability of agents to leverage this new technology is essential to delivering next-generation support.

"Agents must be willing to learn how to use new technologies and tools that can enhance their productivity and efficiency. Even more importantly, they must be comfortable with synthesizing data across multiple systems to solve complex problems and deliver value to customers," Tim Shi states.

High-performing agents will not just be equipped to use technology, but to be proficient in leveraging it to deliver comprehensive and tailored support to customers.

STEP 3: PINPOINT WHERE GENERATIVE AI WILL THRIVE

Generative AI is obviously a key tool for organizations looking to innovate and improve their CX operations. But, before diving into implementation, leaders should take the time to understand how it will best support the contact center. Leading an intentional deployment means creating objectives and guidelines for effective transformation.

Additionally, to create more uniform standards for CX success, leaders must understand how generative AI can support this journey and leverage it sufficiently.

Cresta's Tim Shi outlines key areas that generative AI will support across the agent and customer journey:

- **Hints and suggestions.** By analyzing customer data and interactions in real time, generative AI can provide agents with personalized recommendations and next-best actions. This not only helps the agent to more nimbly navigate a customer conversation, but also coaches them in real time, upleveling their skills.
- **Auto summarization and note-taking.** Generative AI can automatically summarize customer calls and generate detailed notes, automating away this tedious and time-consuming process for agents. This streamlines administrative work, improves overall accuracy, and ensures that critical customer information is captured.
- **Reduce cognitive load.** Generative AI reduces repetitive tasks and workflows that have previously been a burden for contact center agents.
- **Improve retention and employee satisfaction.** As agents have opportunities to grow their skills, move away from manual and repetitive work, and get instant feedback, employee engagement and satisfaction increases, thus improving retention in an industry plagued by extremely high turnover.

With all of these improvements, organizations will finally benefit from a more flexible and empowered frontline. Giving agents both the tools and training to meet the highest standard of support will ensure they are thriving and engaged in their role.

By leveraging real-time AI, leaders will be in the position to amplify the best practices of top performers and create a standard of success that can be replicated across the contact center. Generative AI is one of the most critical tools for achieving this standard — by decreasing ramp up time, increasing efficiency and enhancing expertise, agents will be empowered to truly exceed expectations across the journey.

Ultimately, amplifying agents' best practices leads customers to develop trust in your organization; because when they need support, it is not just accessible, but exceptional at every touchpoint.

Company: Brinks Home

Challenge: Sought to enhance visibility, streamline contact center operations, and improve agent efficiency and QA. Complexity with various tech hindered ability to implement conversational intelligence without a substantial overhaul.

Solution & Result: A seamless integration into existing contact center solutions, including their on-premise hardphone tech. This streamlined approach saves time, cuts costs, and enhances consistency and quality in both agent performance and customer experience. 8% lower AHT, ±650 hours saved in typing time, \$300K in cost savings, 73% improvement in call transfers.

Company: Oportun

Challenge: Oportun's legacy approach to QM was reactive, involving resource-intensive sampling methods and largely untapped data. The team was unable to identify coaching opportunities in real time or see a holistic view of agent performance, and had concerns about the potential for risk vulnerabilities.

Solution & Result: Cresta enabled Oportun to democratize AI usage across the team, empowering both agents and leadership to access and utilize real-time insights for continuous improvement. Agents have real-time coaching and transcription capabilities, leading to increased confidence, productivity, and autonomy, which has also reduced attrition rates.

50% reduction in QM workload. 100% QM coverage across conversations. Better operational efficiency with increased agent satisfaction, reduced onboarding times, and a lower agent attrition rate.

Company: Cox Communications

Challenge: Needed to enhance agent performance and meet growing KPIs/revenue targets with a hybrid workforce.

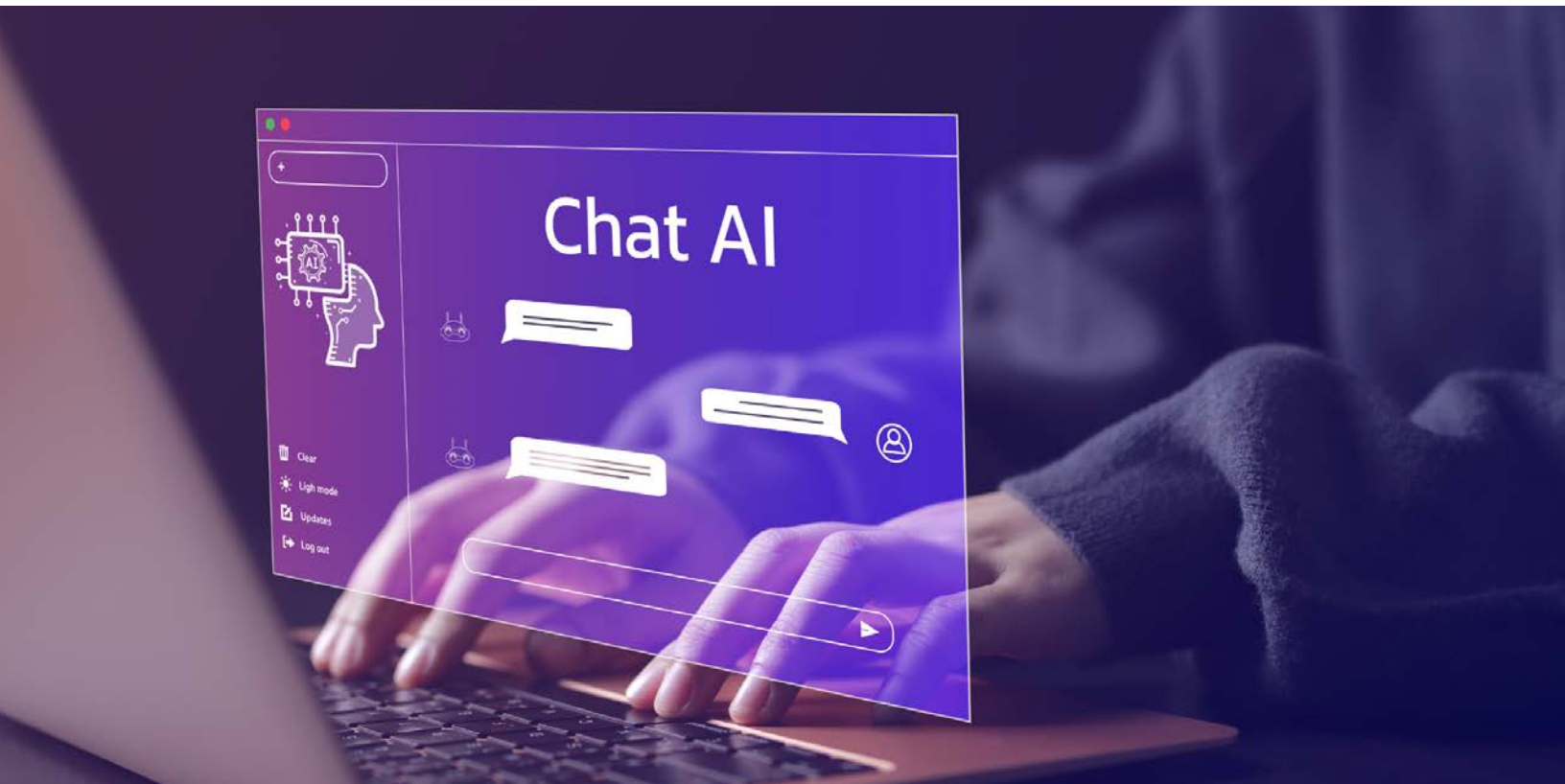
Solution & Result: An updated customer digital experience aligned agents and coaching, featuring a standardized sales and retention process reinforced by Cresta's Agent Assist platform. Managers can now track and analyze 100% of agent-customer conversations for performance reviews and coaching plans.

20% rise in retention, 30% increase in revenue, 15% increase in conversion. 28.% decrease in AHT, 50% reduction in new hire ramp time.

Company: Vivint

Challenge: They faced limited visibility into 60,000 customer calls/week using their existing tool. Only a small percentage received QA evaluations, with a significant lag time. The manual, siloed processes across different tools hindered the ability to take swift actions in line with their fast-paced business operations.

Solution & Result: Through Cresta, Vivint embraced coaching plans, scorecards, and automated QA to streamline coaching processes and decrease evaluation time. They also used the real-time generative AI to promptly act on insights and efficiently track key behaviors. 25% increase in supervisor efficiency - 5 hours per week per supervisor. 3% higher install rates. 100% calls analyzed and 90% behavior adherence to processes designed to increase install rates.



Beyond the Buzz: Making Gen AI a Tangible Game Changer

AI has been a key industry tool in the contact center space for quite some time — discussions around new technology and innovation in CX inevitably end up centered around it. AI has often been presented as a way forward, a path to finally delivering better, faster and more effective customer experiences. It has become a necessary tool for streamlining workflows and enhancing interactions across the customer journey.

When generative AI came to the forefront, this message remained the same: AI will transform, it will improve operations and expand our reach as customer-centric organizations. But, getting to that point and leveraging AI with ease, has been a consistent challenge for contact center leaders. The benefits are clear, yet so many leaders are reluctant to make the step forward and begin their AI journey.

In fact, when it comes to generative AI, 46% of leaders say they are cautiously optimistic. Though hesitant, those same leaders agree that generative AI will make a clear impact on experiences.

Moving beyond the buzz, then, is the first necessary step to implementing AI effectively. Better understanding the clear impact of AI on the agent workflow, highlighting key pain points in the customer journey and making moves to alleviate ongoing challenges is critical to seamless AI progression.

Making strides forward and spearheading innovation requires preparation and confidence. Rather than waiting to see how others leverage new technology and remaining hesitant, leaders must take this opportunity to iterate and improve. Pedro Andrade, VP of AI at Talkdesk shares, “This is a new era of automation and intelligence meticulously designed for the contact center. Generative AI for customer service is a new narrative of contact center AI—one where promises meet real-world requirements and innovation defines the future.”

This breakdown of generative AI will give a clear sense of how this technology will make an impact on CX initiatives and outcomes moving forward. It will share insight on how organizations can bypass the buzz stage and implement tech as a real game-changer that alters the future of customer experiences.

Today's contact center leaders truly have the opportunity to push boundaries with generative AI. In taking real steps forward, contact center leaders will be in the position to transform experiences and offer over-the-top support that enhances engagement and long-term satisfaction.

WHERE GENERATIVE AI IS IMPACTFUL

Going beyond the buzz means breaking down what really matters. Understanding exactly how generative AI fits into the contact center is critical to the success of any implementation.

Sharing insight from Talkdesk VP of AI, Pedro Andrade, here we outline the key areas generative AI is making a major impact.

Automation. Generative AI automates routine tasks, streamlining workflows and allowing contact center staff to focus on more complex issues.

As an automation tool, generative AI offers a way out of tedious, disconnected agent workflows. By streamlining back-end tasks like call summarization, generative AI gives agents the ability to focus on high-priority tasks that deliver value.

Self-service. Generative AI generates highly contextual and natural conversational responses to customer inquiries, reducing the workload on human agents and significantly lowering operational costs. Customers get quicker resolutions to both simple and complex queries, increasing overall satisfaction.

Generative AI shines in its ability to deliver conversational, high-quality insight. Upon leveraging the tool, users are consistently excited by its sophisticated tone and voice. These qualities make it an obvious fit as a proficient self-service tool. In generating contextual responses, generative AI gives customers a resolution that feels personalized and relevant to customer needs.

24/7 service. Generative AI enables contact centers to confidently provide round-the-clock service, ensuring that customer support is available anytime, enhancing customer convenience and satisfaction.

With customer expectations continually increasing, brands are working overtime to deliver meaningful support on a flexible timeline. Today's customers want direct access to support and generative AI's productive self-service features allow organizations to provide service in a timeline that works for customers.

Agent empowerment. Generative AI is empowering agent assistants by augmenting their decision-making abilities and streamlining their workflows. These AI-powered assistants analyze customer interactions, suggest appropriate responses, and automate repetitive tasks, enabling agents to focus their efforts on more complex issues and high-value interactions.

Generative AI also automatically summarizes customer conversations and selects dispositions, improving accuracy, boosting productivity, and reducing average handle time by 15%.

Agents are expected to handle so much, from frustrated customers to unreliable technology, the agent workflow is now more complicated than ever. Generative AI offers a way to break-free from some of these unnecessary burdens. It empowers them with real-time knowledge, eliminates the need for extensive call summarizations and gives them the tools to become a subject matter expert.

Data-driven insights. Generative AI uncovers unknown unknowns in conversation data, helping contact centers understand customer behavior, friction points, and opportunities across different channels by automatically detecting and visualizing topic and sentiment trends with a single click.

Beyond real-time support, generative AI offers a productive path forward for eliminating pain points and underlying issues. Without a clear picture of what is going wrong, contact center leaders are looking past ongoing issues, unknowingly. Generative AI uncovers these data points and paints a true picture of what customers are looking for.

STREAMLINING TRANSFORMATION: WHAT THE NEXT-GENERATION CONTACT CENTER MEANS FOR CX

With a deeper understanding of how generative AI fits in, contact center leaders must recognize where these features and capabilities will make an impact. While all of the features of generative AI are impressive - a successful roll out hinges on a specific and carefully designed implementation strategy that addresses both customer and employee needs.

To go beyond the buzz, leaders should have a clear sense of how their frontline can, and will, leverage this technology. When they outline goals and create a new framework for success, they will reap the ultimate benefits.

Generative AI and the Agent Experience

With generative AI in place, agents are poised to take on more complex work. Pedro Andrade shares, “As generative AI takes hold, almost all incoming requests will first be handled by autonomous virtual agents. These automated systems will have a short conversation with the customer to understand their issue and kick off a resolution process. The traditional triage function will be fully automated.”

This level of automation will take the most tedious and repetitive work off of the agent’s plate. With less technical work to engage in, agents will be in the position to handle more complicated concerns. Agents will then require adequate training and necessary tools to take on these highly intricate interactions. In fact, 59% of leaders say that their employees have fears about shifting to this more challenging and emotional work.

While discussions on more complex work are not necessarily a new concept, Andrade and the Talkdesk team predict a shift in the structure of the contact center going forward.

With greater automation capabilities, the role of the contact center agent will likely be divided into two distinct roles in the future:

- **Path 1:** Highly trained agents that handle the more complex and empathy-needing conversations (i.e., the inquiries that aren’t automated).
- **Path 2:** ‘Steering agents’ that oversee a team of bots to get them back on track if they have issues.

“A steering agent would be a new role. With dozens of conversations happening simultaneously—across voice, email, SMS, chat, and social—between a customer and a bot, the bot may occasionally need assistance in understanding an inquiry. The agent would then “steer” the conversation back on track, and in rare cases, might have to take over a conversation,” Andrade shares.

With this structure, organizations can ensure consistency in all communication by giving a human-touch across the experience, regardless of the channel. This future would establish a path for agents to either take on a more direct role with the customer or act as a behind the scenes expert guiding the technology effectively.

Additionally, with 65% of leaders stating that employees are concerned that the emphasis on self-service could frustrate customers leading to hostile escalation, this additional human touchpoint would largely alleviate any pain points in the self-service journey.

Giving agents a path forward with generative AI is critical to ensuring they are prepared to shift their workflow and, potentially, take on a new role. Beyond its clear benefits, leaders must ensure they have the framework and structure for agent career pathing moving forward. As operations shift, this planning will empower leaders to prepare their front-line and minimize any challenges throughout the implementation process.

Elevating the Customer Experience with AI

From the customers’ perspective, generative AI offers a distinct benefit: streamlined yet engaging communication that feels intuitive. And CX leaders are in agreement, 70% say that they believe generative AI will meaningfully elevate the quality, value and efficiency of self-service.

In the past, customers were plagued with inconsistent interactions that felt robotic and transactional. Poor chatbot experiences left a mark on customers - leading them to stray away from what should be a fast, easy option.

Pedro Andrade shares, “Instead of responding with generic, pre-programmed responses, generative AI allows virtual agents to understand the context of the conversation and respond naturally and conversationally. This results in interactions that feel less like a conversation with a machine and more like a conversation with a human.”

This level of support is something organizations must be working towards. Today’s customers expect meaningful support, no matter the channel - so having a self-service experience that feels just as seamless and human as an agent-led interaction is critical moving forward.

We believe that better customer experiences start with artificial intelligence. With the help of AI, companies can not only respond to a customer's needs and wants seamlessly across channels with personalized, intelligent service, but also predict and prepare for their future needs and wants. These invaluable insights enable companies to really listen to their customers and make them feel more connected—improving customer experiences, reducing costs, and driving operational efficiencies.

- Pedro Andrade, VP of AI, Talkdesk

NAVIGATING CHANGE: MITIGATING CHALLENGES OF CHANGE MANAGEMENT

Generative AI is such a powerful tool and its effectiveness has, at times, become a point of concern for contact center agents and leaders looking to remain human-centered in the age of AI. Employees still need reassurance that generative AI is enacting positive change that will empower them in their roles.

According to CCW Digital research, 79% of employees are still fearful of AI eliminating their positions - meaning a conscious rollout includes transparency in implementation and success with the technology.

Pedro Andrade shares, “Ethical considerations in the adoption of generative AI within the contact center extend to the potential impact on human employees. As companies increasingly turn to AI-powered chatbots, there is a legitimate concern about job displacement for human contact center agents. Ethical responsibility requires proactive measures to mitigate negative effects on employment.”

Keeping agents in the know about technology changes, and the implication it may have on their career path and long-term workflow, is not just a necessary step but a requirement to gaining the buy-in needed from frontline employees. Leveraging AI to its full capability hinges on employees using it effectively and leaning on it to enhance their skills. To go beyond the buzz and see real change, transparency in communication and a strategic rollout is critical.

Beyond job displacement, leadership must also address other ethical concerns with generative AI. Ensuring customers are aware that they are engaging with the technology and understand the role it is playing in their journey is important to long-term adoption.

“Customers possess the right to know when their interactions are mediated by artificial intelligence. This disclosure is especially critical in the realm of chatbots and virtual agents, as failure to provide full transparency can erode trust in the company and damage customer relationships with the brand,” states Andrade.

AI systems must prioritize clear communication, Pedro Andrade suggests. Transparency in the implementation and roll out phases is critical and will foster a sense of honesty and openness that keeps customers engaged and content with new technology.

Leaders who prioritize effective change management highlight potential challenges with both the agent and employee experience and preemptively addresses them to support the transition.

Generative AI: Your Tangible Game Changer



Generative AI has been discussed across industries as a tool that can enhance creativity, streamline processes and enact positive change. Moving beyond the buzz phase and leveraging the technology as a true game-changer, however, takes effective strategy and planning to ensure it is being implemented in key areas.

As leaders break down their top pain points, they can begin to form a deliberate implementation plan that addresses these critical areas. Going beyond the buzz means understanding just how powerful generative AI can be and leveraging it to resolve underlying obstacles that are impacting the bottom line.



When implemented effectively, leaders will reap the benefits of generative AI and see long-term effects on customer and agent satisfaction, engagement and loyalty. Generative AI has the potential to revolutionize the CX function, so taking the necessary first step is making the move to a more productive and efficient contact center of the future.

Appendix





-  **How AI Improves CX**
-  **AI Hype Vs. Reality**





-  **Report: The Role of AI in Redefining Contact Center Efficiency**
-  **eGuide: How to Evaluate a Gen AI-powered Bot**





-  **SupportZebra Sees 78% Drop in Customer Noise Complaints with AI Noise Cancellation**
-  **Metrics that Matter: 10 Call Center KPIs that Bring Clarity and Success**



-  **Modern Customer Service Your Way**
-  **Generative AI and the Contact Center of the Future**



-  **Simplify and Streamline Your Knowledge Management - How GenAI takes USU Knowledge Management to the next level**
-  **Webinar: ChatGPT Integration with USU Knowledge Management**

2024 Editorial Calendar

JANUARY

Future of Contact Center Employees

APRIL

State of Generative AI

JUNE

CX Trends, Challenges & Opportunities

AUGUST

Modernizing Service Experiences With AI & Digital

SEPTEMBER

Next-Generation Omnichannel CX

NOVEMBER

Future of the Contact Center

FEBRUARY

Strategic Planning For CX Operations

February 9-11, 2023

APRIL

State Of Contact Center Technology

April 6-8, 2023

MAY

New Standards For Customer Contact Performance

May 25-27, 2023

JULY

Modernizing Service Experiences With AI & Digital

July 20-22, 2023

SEPTEMBER

Customer Experience Trends, Challenges And Innovations

September 14-16, 2023

OCTOBER

Business Continuity 2.0

October 26-28, 2023

DECEMBER

Future Of The Contact Center: A Forecast

December 14-16, 2023

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