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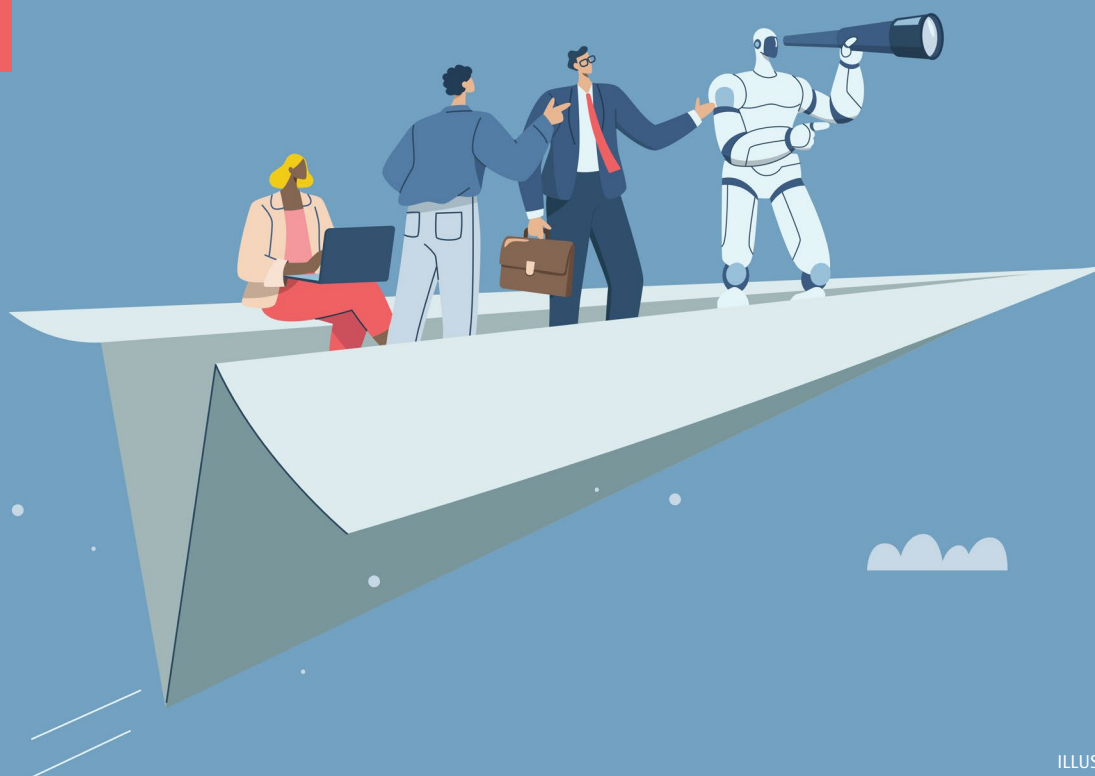


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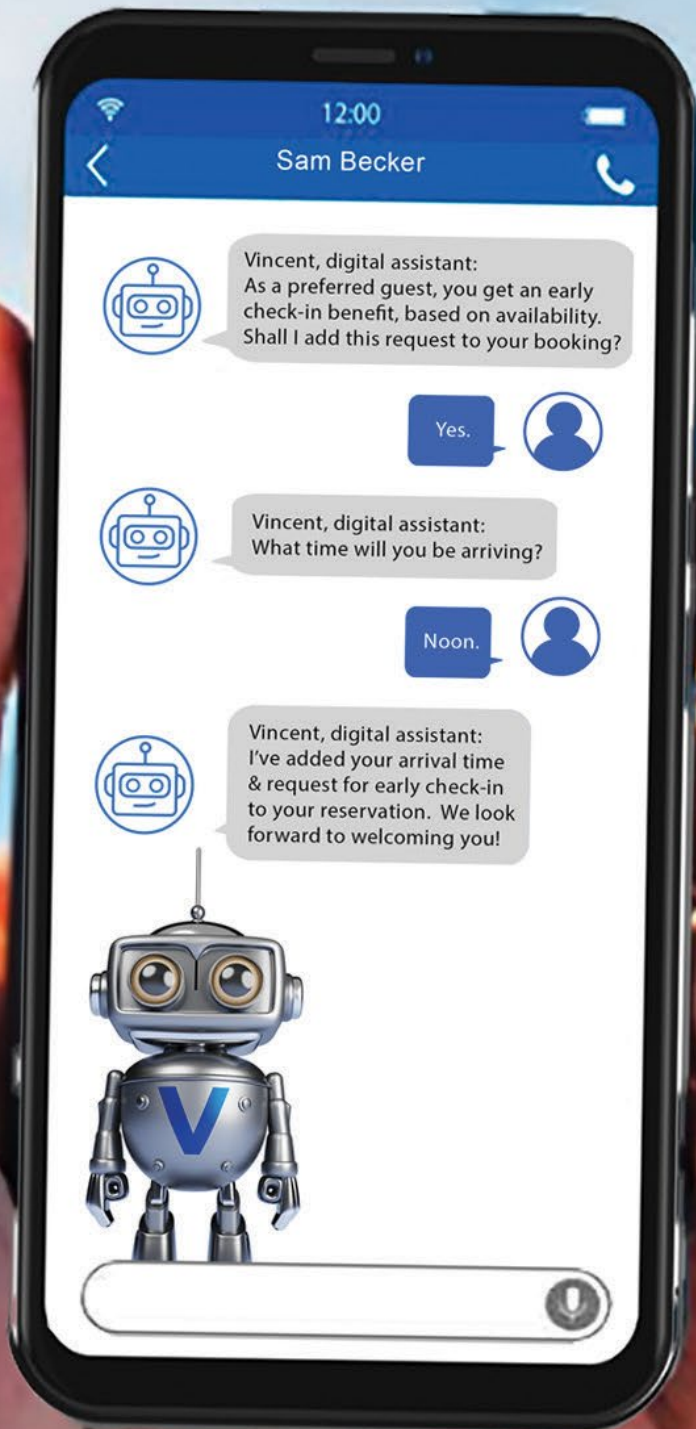
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THOUGHT YOU SHOULD KNOW

A MONTHLY DOSE OF FACTS & FIGURES FROM INSIDE THE ISSUE



40%, 30%, 20%, 10%

Roughly 40% of contacts can be **eliminated**, 30% can be **simplified**, 20% can be **digitized or automated**, and 10% should be **elevated** as high-value human conversations.

SOURCE
CUSTOMER CONTACT OPTIMIZATION:
AI WON'T SAVE YOUR CONTACT CENTER
By Jeff Sheehan
[#CCOPTIMIZATION](#)



66%

66% of consumers actively avoid asking a human employee for help.

SOURCE
AUTOMATION:
REPAIRING MISSED CUSTOMER CONNECTIONS
By Ricki Lang
[#AUTOMATION](#)



14%

Survey finds that only 14% of customer interactions were fully resolved through self-service.

SOURCE
UPSKILLING:
ASCENDING BEYOND COPILOTS
By Eitan Cohen
[#UPSKILLING](#)

15%-20%

McKinsey's research shows that contextual, personalized cross-selling can lift revenues by 15%–20%.

SOURCE
PERSONALIZATION:
THE POWER OF POST-PURCHASE PERSONALIZATION
By Ken Rapp
[#PERSONALIZATION](#)



23%

Nearly a quarter (23%) of consumers still report they are uninterested in using AI for customer service.

SOURCE
FEATURE:
IS THE AGENTIC AI JOURNEY WORTH THE DRIVE?
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FROM THE PIPELINE



LINDA HARDEN

PUBLISHER, CONTACT CENTER PIPELINE

Our kids say "Back in My Day" all the time. They then go on to giggle, giggle and come up with a witty recall of what we experienced when we were younger. Funny, I think each of us could talk about "Back in My Day" with our contact center operations.

I don't think this means we are a bunch of older folks sitting around and reminiscing about the good old days. Just look back at the last five years and all the changes we have seen in CX, quality and monitoring, technology, metrics and measurements, in-person meetings vs. remote operations...and our list goes on and on.

I love this month's issue as it embraces so many of the changes we see. We discuss the agentic AI journey, metrics, coaching, customer connections, performance, transformation, optimization, voice AI and more. It is an exciting time with lots of change.

Enjoy because "Back in My Day"...

Linda Harden

Linda Harden
Publisher
Contact Center Pipeline

CONTACT CENTER PERFORMANCE



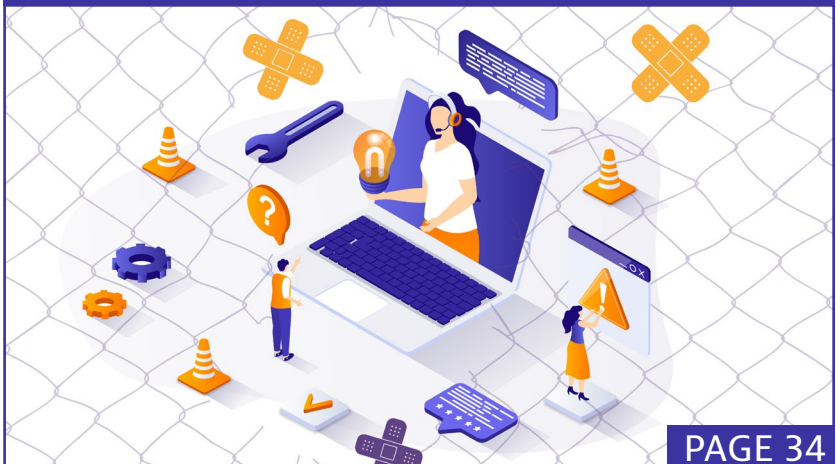
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AI CAN BOOST SALES AND SERVICE PERFORMANCE...

BUT ONLY IF WE STOP AUTOMATING THE WRONG THINGS.

BY SINDRE HAALAND

CONTACT CENTER ISSUES



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REPAIRING THE CONTACT CENTER SAFETY NET

HERE'S WHY IT'S TORN AND WHY IT MUST BE FIXED.

BY CHRIS MARRON

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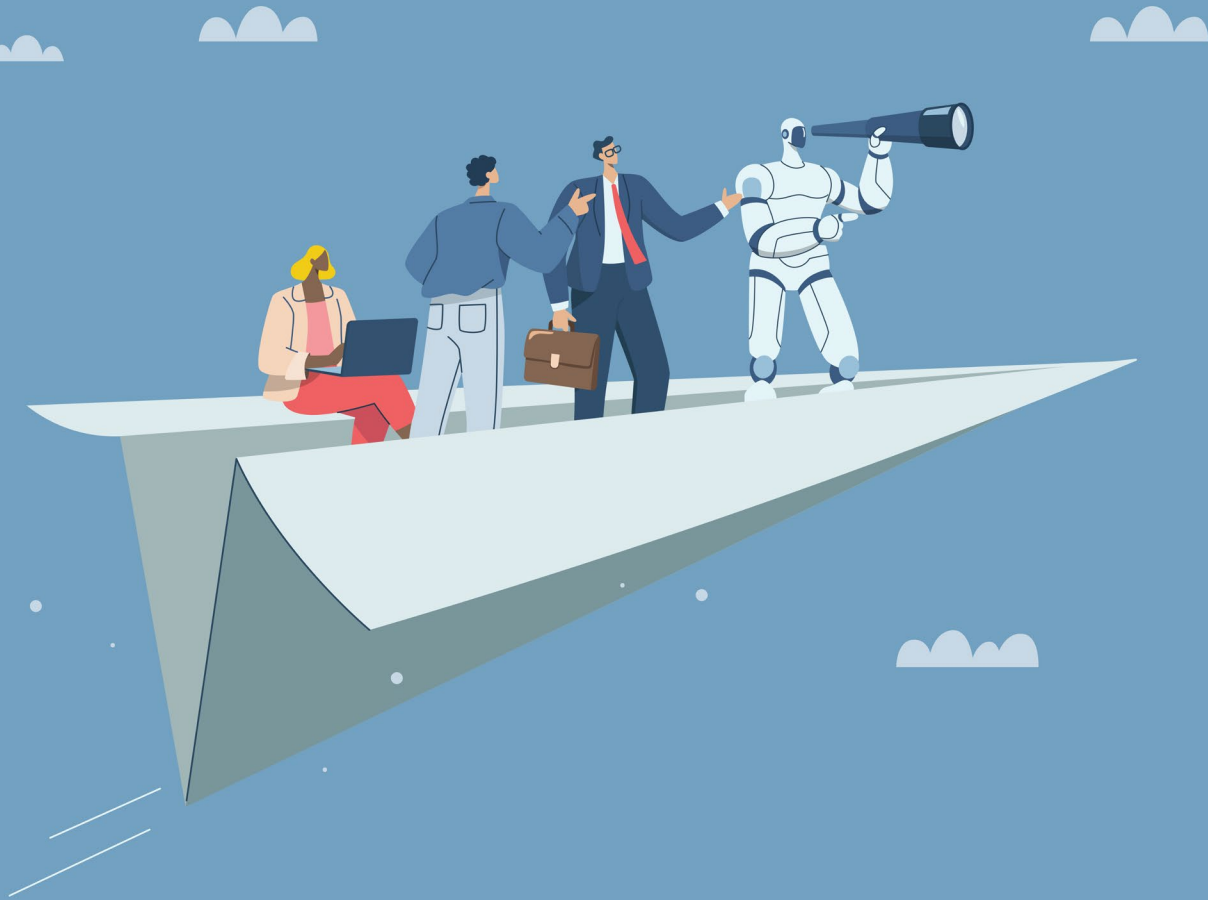


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IS THE AGENTIC AI JOURNEY WORTH THE DRIVE?

CAN AGENTIC AI BRING CONTACT CENTERS TO WHERE THEY WANT TO BE?

Contact centers are moving faster down the road to increased automation, where machines are becoming the norm and people the exception in customer interactions. Where technology also supports humans: whose roles are now to handle only what they cannot and as backups, oversight, and overrides.

This journey is being accelerated by AI advancements like agentic AI. It is being driven by the C-suite to cut costs and improve revenue retention-and-growing excellent customer experiences (CX): and not necessarily in that order.

But as organizations are learning (yes, once again), AI, like every other complex tool, also has its downsides that must be investigated. And, most critically, it must be carefully im-

plemented, including thorough integrations with the people, processes, and other technologies.

In the [July 2025 issue Feature](#), our expert panel touched on agentic AI and automation in routing and handling customer contacts. But we dug a little deeper and posed these related questions as organizations gain experience with these technologies.



Our panelists are:

- Kevin McNulty, Senior Director, Product Marketing, Talkdesk
- Sarika Prasad, Director, Product Marketing, Five9
- Neeraj Verma, Vice President, Advanced Technology, NiCE

Q DOES AGENTIC AI HAVE A ROLE IN ROUTING CUSTOMER CONTACTS AND IF SO, IN WHICH CHANNELS? IN ENABLING MORE INTERACTIONS TO BE HANDLED BY AUTOMATED AGENTS RATHER THAN BY LIVE AGENTS?

KEVIN MCNULTY (KM)



Agentic AI has a big role to play in routing. But not in the way we've traditionally thought about it.

Instead of routing to a static queue or decision tree, agentic AI enables real-time reasoning based on context, intent, urgency, customer history, and business rules: and it does this dynamically, across channels.

With agentic AI it's not just about "who takes the call" anymore. Instead, it's about "what combination of AI and human agents can resolve this most efficiently and effectively."

- In some cases, that may mean handing the interaction off entirely to a team of AI agents. One to authenticate the customer, another to process a refund, a third to update backend systems, and a fourth to confirm completion with the customer.
- In other cases, it might mean an AI copilot supporting a live agent while AI agents work in parallel on backend tasks.

This multi-agent model also means AI isn't confined to chat or voice. It can orchestrate across both—and beyond—handling asynchronous messaging, email threads, app interactions, and even outbound engagement.

The bottom line is this. Agentic AI doesn't just make automation possible; it makes it collaborative, continuous, and capable of handling complexity in a way traditional bots never could.

SARIKA PRASAD (SP)



Agentic AI is no longer a future concept. It's here and reshaping the contact center.

Moving beyond back-office automation, AI agents—empowered by varying levels of autonomy—are now taking on diverse customer-facing roles. They're streamlining engagement, accelerating resolution times, and intelligently routing customers to the right destination at the right moment.

Traditional virtual agents are well-suited for handling routine inquiries and repetitive tasks, making them an effective first point of contact.

However, with the advancement of generative AI, today's AI agents go much further. They can quickly understand the context and intent behind a customer's issue and determine the most efficient path to resolution across channels.

These AI agents efficiently gather key information, resolve issues autonomously when possible, or seamlessly route the interaction to the most appropriate resource - whether that's a chatbot or human agent - over voice or digital channels.

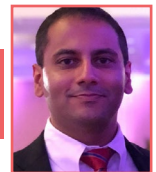
This dynamic routing ensures faster resolutions and reduces friction, all while supporting the omnichannel flexibility that modern customers expect.

In fact, we find nearly 60% of consumers' preferred communication channel depends on the context of the situation, making it critical for companies to offer fluid transitions between touchpoints.

Agentic AI enables just that by learning customer preferences and responding accordingly. It can also be a key tool for human agents in the routing process, ensuring that if a situation escalates further, the agent has all of the necessary information to help the customer, without being repetitive.

In today's high-volume, high-expectation environment, then AI agents aren't a "nice to have," they are a strategic imperative. They empower contact centers to scale efficiently, deliver faster service, and meet customers where they are, all while freeing up live agents to focus on high-value, complex interactions.

NEERAJ VERMA (NV)



Traditional IVR is being enhanced by agentic AI to better understand and respond to customer intent without human intervention.

These advancements are streamlining routing and resolution for routine queries, significantly lightening the load on live agents and enabling organizations to deliver faster, more efficient service.

I'd argue that "proactive" is where the real transformation is happening when it comes to agentic AI. If you think about the hierarchy of interactions, no business truly wants inbound.

Inbound is almost a symptom; something you aim to reduce, not optimize. When people say, "I want to improve my inbound experiences," what they're often really saying is, "I want to create a world where customers don't need to reach out in the first place."

Historically, proactive AI has been limited to basic use cases: simple reminders, alerts, or status updates.

But recently we've seen a major shift. Both agentic and generative AI are now orchestrating outbound interactions in far more intelligent and meaningful ways. They're detecting patterns, identifying anomalies, and triggering personalized, conversational outreach that feels more human than ever.

As innovation continues, our focus must remain on using AI to power seamless, proactive, and deeply personalized interactions, raising the bar for what modern customer service can deliver.

CUSTOMER ACCEPTANCE

Q AI, LIKE AGENTIC AI, HAS BEEN HERALDED AS A MASSIVELY TRANSFORMATIVE TOOL. BUT IS AI TURNING OUT THAT WAY?

- Is it becoming like the grocery self-checkouts that customers appear to be avoiding and going back to staff?
- Or more like bank ATMs and speech-enabled IVR, which customers have generally accepted, handling the simpler, high-volume interactions while leaving the complex engagements to people?

"...WHEN [AI] UNDERSTANDS CONTEXT, REMEMBERS PAST INTERACTIONS, AND RESOLVES ISSUES WITHOUT FRICTION, [CUSTOMERS] STAY."

-- KEVIN MCNULTY

KM: The problem is that most AI still behaves like a vending machine: limited menus, rigid options, and zero awareness of what came before. It can only respond to what's pressed, not to what's meant. Customers aren't rejecting automation; they're rejecting bad automation that makes them do the system's work.

When AI can't recognize nuance, traps users in loops, or forces them to start over, they seek a human. But when it understands context, remembers past interactions, and resolves issues without friction, they stay.

That's the turning point agentic AI creates; it replaces the vending machine with a system that can reason, adapt, and deliver outcomes proactively. Once customers experience that kind of competence, they don't want to go back.

SP: While AI may have initially been met with skepticism in the CX space, with hesitations that persist among consumers, it continues to be a transformative tool for customer interaction.

In the contact center, agentic AI is taking on the role that ATMs and IVRs once did: handling the high-volume, low-complexity interactions so human agents can focus on the more complex issues that require the judgment and emotion of a person.

We continue to take a human-in-the-loop approach to CX to ensure that AI doesn't become the self-checkout experience that people abandon, but rather as an effective tool that consumers can trust for accurate and efficient service.



NV: AI in contact centers isn't just about handling repetitive interactions. It is becoming a full-fledged extension of the workforce.

Modern AI can move across the entire service ecosystem, automating complete journeys from routine requests to mid-office approvals and back-office fulfillment, while working seamlessly alongside human employees.

It's important to remember that AI is not new and AI in the contact center is not new. Rather than focusing on the newest large language model (LLM) or classes of AI, we have been building CX-specific AI solutions for decades.

That means bringing the most appropriate type of AI to deliver the best CX outcomes for consumers. This approach brings together AI memory, knowledge assets, deep industry expertise, the best LLM for each use case, security, scalability, and a comprehensive testing framework.

It allows building solutions that effectively copilot human agents while guiding customers effortlessly through their journeys, meeting the needs of all customers.

Companies that deploy AI solely for cost-cutting often fall short. But when AI is thoughtfully integrated, handling routine tasks while augmenting human capability, it strengthens both customer and employee experiences, delivering real outcomes rather than just responses.

In short, AI is no longer a support tool; it's a collaborative partner, amplifying human capability, driving operational efficiency, and enabling smarter, end-to-end CXs.

AI CHALLENGES

Q THERE HAVE BEEN MANY REPORTS OF AI APPLICATIONS, LIKE AGENTIC AI, NOT MEETING THEIR PROMISES AND RESULTING IN FEWER BENEFITS THAN WERE HOPED FOR. BUT WHAT ARE YOU HEARING IN THE CONTACT CENTER? WHAT CHALLENGES IN DEPLOYING THESE TECHNOLOGIES HAVE THEY ENCOUNTERED?

KM: The main challenges we see are companies relying on single bots, sometimes even agentic bots, that are simply too limited in scope.

"AGENTIC SYSTEMS NEED SEAMLESS ACCESS TO FRESH, UNIFIED KNOWLEDGE ACROSS CRM, WORKFLOWS, SUPPORT SYSTEMS, AND HISTORICAL INTERACTIONS."

-- NEERAJ VERMA

They can handle narrow tasks but when conversations stray from scripts or require coordination across systems, they quickly fall short.

SP: In contact centers, one of the most challenging hurdles to agentic AI adoption that CX leaders must overcome is consumer trust and reluctance.

Despite the promise and advancements of AI, consumers remain cautious. We found in our paper, "2025 Customer Experience Report – Consumer Edition," that nearly a quarter (23%) of consumers still report they are uninterested in using AI for customer service.

NV: What I'm hearing from conversations with contact center leaders and integrators is that the challenges with agentic AI aren't about the technology being overhyped. [Instead], they're about the realities of bringing it into complex environments.

The promise of AI that can reason, act, and learn on its own is exciting. But many organizations are quickly discovering that the foundation underneath (data, integrations, governance) just isn't ready yet.

First, the data and context infrastructure is often underbuilt.

Agentic systems need seamless access to fresh, unified knowledge across CRM, workflows, support systems, and historical interactions. When those sources are stale, siloed, or disconnected, the AI hits dead end or hallucinates.

[Second], we also see challenges around error compounding and governance.

In a multi-step task, one misinterpreted step early can cascade into costly mistakes downstream. Leaders want to innovate but are cautious about compliance, auditability, and reputational risk. Human oversight isn't optional; it is core to maintaining confidence as AI takes on more responsibility.

The challenges we're seeing aren't failures of AI; they're lessons in execution. Agentic systems can absolutely deliver value, but only when organizations treat them as part of an evolving ecosystem that blends people, process, and technology.

RECOMMENDATIONS

Q WHAT ARE YOUR RECOMMENDATIONS TO OBTAIN THE OPTIMAL RESULTS FROM AGENTIC AI, INCLUDING AVOIDING AND RESPONDING TO ITS ISSUES?

KM: The success or failure of agentic AI comes down to data: how it's organized, shared, and continually refreshed. Too many AI systems are built on brittle integrations and siloed data, which leads to hallucination and drift.

The answer is a living data lake architecture that unifies structured and unstructured data: voice transcripts, chats, CRM records, and knowledge articles into a single accessible fabric.

On top of that, a knowledge mesh ensures AI agents can find the most current and authoritative information, regardless of where it resides. This turns data into a dynamic asset rather than a static warehouse.

Organizations that design for discoverability, traceability, and continuous learning get AI that evolves with the business. Those that don't end up with digital self-checkouts: technically functional, but easily abandoned.

"AGENTIC AI ISN'T A 'SET IT AND FORGET IT' SOLUTION. SUCCESS REQUIRES ONGOING EVALUATION AND IMPROVEMENT. THIS INCLUDES SOURCING AND APPLYING FEEDBACK..."

-- SARIKA PRASAD

SP: To address consumer hesitations, companies have to increase [their] focus on deploying agentic AI tools that are trustworthy, intuitive, and efficient. Additionally, to win over reluctant users, transparent deployment, coupled with compliance and accuracy, is essential.

Agentic AI isn't a "set it and forget it" solution. Success requires ongoing evaluation and improvement. This includes sourcing and applying feedback from customers and agents to better understand what is working, what isn't, and what can be improved.

Companies that regularly update and optimize their AI agents can address small issues before they become major problems, [thus] ensuring the technology meets its promise rather than its hype.

NV: To achieve optimal outcomes with agentic AI, organizations should adopt a strategic approach that emphasizes purposeful design, robust training, and continuous oversight.

It starts with purpose-driven design, defining clear objectives and leveraging historical and operational data to train AI agents so they can deliver meaningful impact.

Equally important is human oversight: robust governance frameworks, continuous monitoring, and audit trails ensure AI operates safely and transparently within enterprise standards.

Agentic AI should augment, not replace, human expertise. Seamless collaboration between AI and frontline teams improves both efficiency and CX.

Finally, continuous learning is critical, as AI models must evolve based on real-world feedback and changing business contexts to stay relevant and effective.



Brendan Read is Editor of Contact Center Pipeline. He has been covering and working in customer service and sales and for contact center companies for most of his career. Brendan has edited and written for leading industry publications and has been an industry analyst. He also has authored and co-authored books on contact center design, customer support, and working from home. Brendan can be reached at brendan@contactcenterpipeline.com.

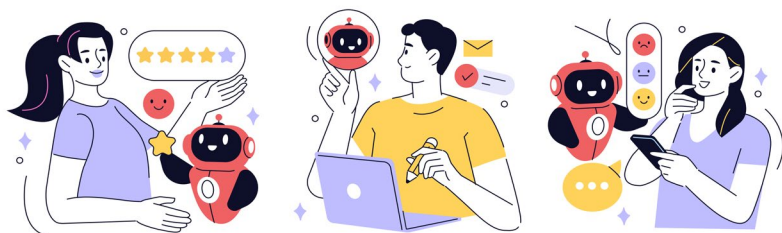




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GOING BEYOND THE METRICS

HOW TO ADDRESS THE DRAIN ON COGNITIVE, EMOTIONAL BANDWIDTH.

"The customer isn't the hard part."

That line landed heavy during a recent agent focus group. Heads nodded.

Agents weren't venting. They were diagnosing. The friction wasn't coming from the voice on the line. It came from the systems that didn't connect. From rules that penalized initiative and protocols that couldn't flex when customers threw a curveball.

The irony? These agents wanted to do more - to advocate - not just comply. But their mental and emotional bandwidth was maxed out.

And the real frustration wasn't only the broken systems. It was the sense that the strain they were carrying wasn't always being seen.

Leaders cared - agents believed that - but when everyone is overloaded, both listening and noticing can slip. And when those early signals go unseen, the friction in their day never really changes.

PERFORMANCE IS ONLY THE TIP OF THE ICEBERG

We tend to measure performance through handle time, quality scores, and resolution rates.

But those numbers only reflect what's visible on the surface. They don't show what leaders can often sense when they slow down long enough to look.



WHEN LEADERS START NOTICING THESE MOMENTS...THEY SEE MORE THAN PERFORMANCE METRICS.

Like at the mental juggling, emotional labor, and the hesitation that comes from not knowing whether they're empowered to make the right call.

When these pressures go unnoticed, performance might dip. But just as often, it stays high because agents push through anyway. That kind of performance looks strong on paper, yet it quietly drains the very capacity they rely on to do the work well.

The very acts of straining and draining cause friction, and wear-and-tear, on agents' cognitive and emotional bandwidth. This leads to their diminished ability to effectively help customers.

This is where observing and listening become operational tools. When leaders notice the strain behind the numbers - the longer wrap-up times, the tight shoulders after tough calls, the silence before clicking into a glitchy system - they start to understand what the metrics can't say.

And that understanding points directly to the small, meaningful steps leaders *can* take, even without a system overhaul.

So, let's explore how those steps protect - and even restore - the cognitive and emotional resources agents need to perform well.

And let's look at the practical ways leaders can ease the load, invite solutions, and unlock the creativity agents often hold back simply because they're too worn down or unsure anyone will act on what they share.

WHAT'S DRAINING HUMAN BANDWIDTH?

We've all seen and experienced this B-movie many times before.

- The knowledge article that hasn't been updated in months.
- The CRM that takes three tabs to get anywhere.
- The moments when an agent has to type the same customer information into two different systems because nothing talks to each other.

Here's where and why the capacity of agents to handle the stress of the job drains away, leading to the unhappy endings of agent burnout, dissatisfied customers, and poor results.

- **Protocol rigidity.** Those times when an agent knows the *right* thing to do for a customer - waiving a small fee, skipping a script line that doesn't fit, offering a faster workaround - but they hesitate. Not because they don't trust their judgment, but because they don't know if that judgment will cost them on QA.
- **Context switching.** The mental whiplash of closing a tough call, grabbing a chat that's already waiting, and then jumping into another phone call before they've had a chance to reset their breathing or their notes.
- **Unvoiced stress.** The practiced calm in an agent's voice while their shoulders are still tight from the last interaction, and the reality that there's no protected space to release that tension before the next customer arrives.

Most agents don't burn out from the customer in front of them. They burn out from pushing through an environment that makes helping harder than it needs to be.

One agent captured it in a single line: "I just want to help...but I'm always worried the right thing could cost me, on QA, on incentives, even on my performance review."

When leaders start noticing these moments - the small strains behind the steady voices - they see more than performance metrics. They see (and hear) what's weighing their agents down. And once they see it clearly, they can finally influence what comes next.

RETHINKING THE MANAGER'S ROLE

You may not control the systems. You may not write the scripts.

But you do shape the space agents work inside every day. You can notice the load before it ever shows up in the metrics.

And you don't need a new platform to reduce that load. Sometimes it starts with seeing what's missing - or what's too much - and asking different questions.

Three Kinds of Load You Can Notice Right Away

The load agents carry shows up in different ways, and each type requires a different kind of support.

- 1 **Cognitive load:** too many tools, unclear paths, constant mental juggling.
- 2 **Emotional load:** tough calls stacked without time to reset.
- 3 **Procedural load:** rules or steps that create daily workarounds.

Noticing these kinds of strain helps leaders understand what the metrics can't show.

WHAT LEADERS CAN INFLUENCE (EVEN WHEN SYSTEMS DON'T CHANGE)

Leaders have four levers that make a meaningful difference (see **FIGURE 1**):

- 1 **Pace.** You can't slow the queue, but you can shape the flow. If you see an agent take a run of escalations or emotionally heavy calls, shift them into after-call work briefly or check in to see if they need a moment to reset. Sometimes 60 seconds changes the next six calls: and protects the agent behind them.
- 2 **Clarity.** Uncertainty drains energy. Reinforce what empowerment actually looks like on your team. When an agent hesitates, offer guidance like: "If it helps the customer and doesn't violate policy, you can make that call, and I'll stand behind you." Two or three clear examples go further than a dozen reminders.

FIGURE 1

What Leaders Can Influence — Even When Systems Don't Change



Pace

Small adjustments that protect mental breathing room.



Clarity

Reducing hesitation by making empowerment visible.



Recovery

The reset moments that keep emotional load from piling up.



Voice & Agency

Inviting insight from the people closest to the friction.



3 Recovery. Recovery isn't a break. It's the mental reset after intensity. Normalize brief resets by saying, "If you need a moment after that call, take it. I'm watching the queue." Give agents permission to breathe without feeling like they're falling behind.

4 Voice and agency. Create simple loops where friction points are named and revisited. Ask, "What slowed you down today?" Track what gets fixed and what's still in progress. Agents don't expect miracles: they expect movement.

When leaders act on what they notice - the pace, the clarity, the recovery, the friction - agents feel supported, not scrutinized. But when those signals go unanswered, the cost shows up quietly at first, then all at once.

THE COST OF DOING NOTHING

When the load goes unseen, agents don't usually announce they're overwhelmed. They adjust. They avoid certain calls. They stop raising small flags that used

to help you catch problems early. They pull back their creativity because it feels safer to stay inside the lines.

Eventually, the people who care the most - the ones who hold the toughest calls together - begin to wear out first.

Burnout rarely announces itself. It shows up in silence, hesitation, and the loss of the qualities we hired for.

Noticing the load isn't a luxury. It's a retention strategy. It's a quality strategy. It's the foundation of every metric we measure.

When leaders reduce friction, agents regain bandwidth. That bandwidth becomes confidence, and confidence becomes better performance - not from pushing harder - but from having the space to work well.

START WITH ONE SMALL CHANGE

You can't remove every friction point in a day. But you can notice one: and act on it.

That's where change begins.

Here's an example. This week, notice one place where an agent's load feels heavier than it should. Check your read

**WHEN LEADERS
REDUCE FRICTION,
AGENTS REGAIN
BANDWIDTH.
THAT BANDWIDTH
BECOMES
CONFIDENCE...**

with the agent and let them expand on what you saw. Take a few notes and share them back to make sure you got it right.

Then agree on one or two small steps that could ease the strain. Try them. Follow up. See if the change made their day even a little lighter.

Small shifts like these don't just lighten the day. They change the culture one moment at a time. ①



Kathryn (Kay) Jackson is an expert in the contact center industry. She is the co-founder of ResponseLearning and LearnCC.com, which she launched to provide organizations with consulting, training solutions, and knowledge-based products. She is on the forefront of simulation learning and knowledge base management.

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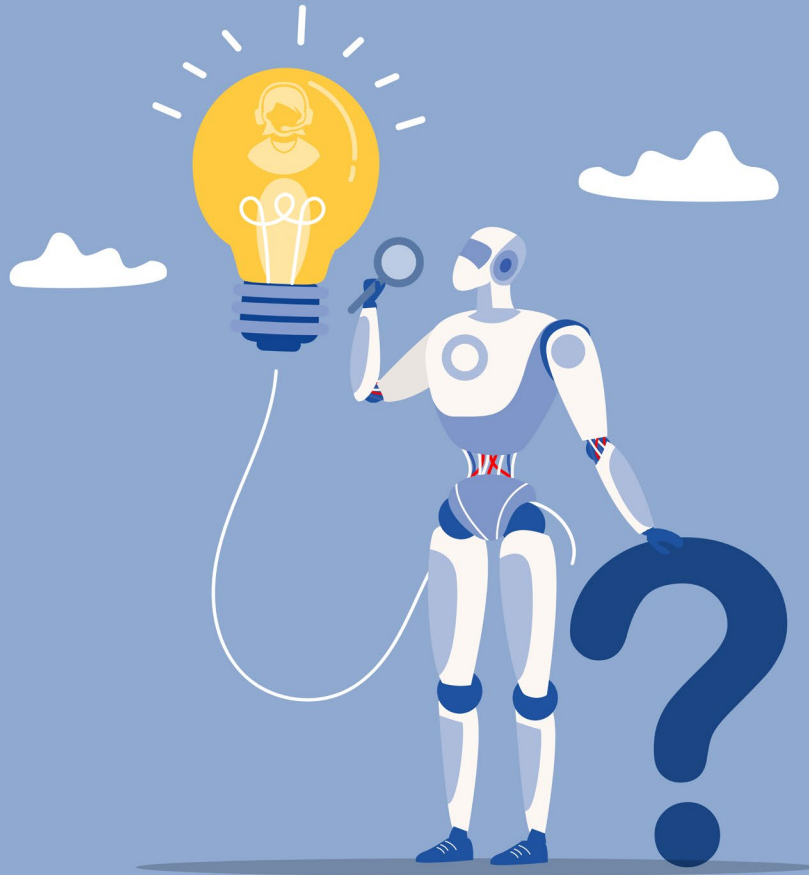
Unstructured interaction data apparently is now the norm, from what I am gathering from industry sources, of what flows through a contact center. These include, but are not limited to, call recordings, chat logs, emails, screen captures, voice recordings, images, and surveys. Yet much of it sits in silos separated and without the structure to make it useful.

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WILL AI SHRINK THE CONTACT CENTER?

WHAT WILL CENTERS LOOK LIKE WITH AI?

The operative word here is “shrink”, as this implies that AI will lead to scaled-back contact centers. At face value, this means having fewer agents, which AI makes possible via automation that can replace human agents in a variety of ways.

This remains a touchy subject, since the optics of smaller contact centers being the rationale for AI are not good for vendors: and contact center leaders will quickly alienate their agents if they toe that line as well.

Complicating matters is the silver bullet view held by those in executive management that AI is mainly about cost

reduction. Since they make the investment decisions, this needs to be part of the calculus with AI, especially as their AI spend keeps rising and tangible forms of ROI are few and far between.

Here's why. Cost reduction is a tangible ROI metric to maintain executive management's support for AI. One that can be achieved quickly with workforce cuts.

The contact center has long been one of the best use cases for AI, so it's not surprising to connect the dots between deploying AI there and automating away agent jobs.

While the rationale is sound – especially to top management – the realities on the ground for contact center leaders are more challenging.



THE CONTACT CENTER HAS LONG BEEN ONE OF THE BEST USE CASES FOR AI, SO IT'S NOT SURPRISING TO CONNECT THE DOTS...

HOW AI CAN REALLY PROVIDE VALUE

Post-COVID-19 pandemic, contact centers have seen steadily rising traffic volumes: and they don't have the luxury to simply hire more agents to manage this.

- One driver is the growth of eCommerce and digital transactions, where consumer activity is shifting from in-store to online, making the contact center the prime point of contact.
- Another factor is the adoption of digital channels that give consumers more options than ever before to inquire for help.

In lieu of adding human agents, automation is clearly the best response, for which AI is well-suited. Contact center automation can take many forms, both for giving customers better self-service options and to improve operational workflows.

This is why AI can be transformative: and go beyond incremental gains that may reduce costs here and there. Therefore, AI needs to be viewed strategically rather than as a point solution: and this means thinking beyond shrinking the contact center to save cost.

Invariably, some agents and supervisors *will* be replaced by AI. But if anything, *the role of the contact center will expand, not contract.*

Why? Because AI provides far richer value to the business by leveraging the vast amounts of data tied to customer interactions into enabling better customer experiences (CXs).

Staff who can/will not adapt to AI will be at risk of losing their positions. But those who do will be able to perform more effectively and enable higher-value outcomes for the business.

THINKING BEYOND REDUCING LABOR COSTS

The challenge here is for contact center leaders to broaden the thinking among business leaders that AI is more than just cost savings from headcount reduction and process automation.

By shifting the focus to making CX better, other forms of savings will emerge, such as training for new agents, since current agents will be happier in their work and less likely to leave.

As CX levels rise, customer retention improves, reducing the costs to replace them. In regulated sectors, AI will help improve compliance around customer communications: and lower the costs for violations for not being compliant.

Perhaps most of all, AI can easily scale, and when deployed effectively, the contact center will have greater capacity to handle growth: without needing to add more human agents.

These are just a few examples of cost reductions that AI can drive in the contact center – and for the business overall – that go beyond the kneejerk response of reducing headcount.

The key here is to focus on customer outcomes, and work backwards from how AI can improve CX. All businesses struggle to make this better, and the benefits are well-understood, so top management does not need to be sold on the virtues of CX.

However, cutting jobs to shrink the contact center isn't the way to do that. Rather, AI can make the contact center more impactful in other ways, not just with customers but for the business.

In this regard, AI can be transformative by reshaping the contact center into a strategic hub of data collected across countless customer interactions.

With the right tools and platforms, contact centers can harness that data to drive new forms of business value.

- For customers, they will have more personalized experiences that better resolve problems and make them more loyal to the brand.
- For agents, AI will empower them with new capabilities for more insightful, authentic customer interactions where they feel like they're making a real difference.

Internally, AI will automate workflows to make operations more efficient, but also to free up agents to do their best work by engaging directly with customers.



...AI NEEDS TO BE VIEWED STRATEGICALLY RATHER THAN AS A POINT SOLUTION...

CONCLUSION

This view of AI will only be aspirational for some contact centers, as they can barely manage the everyday pressures of meeting ever-higher customer expectations.

Many contact centers are also constrained by legacy technology that cannot readily be replaced, making modernization efforts difficult. That aside, many contact centers *are* finding ways to adopt AI, especially once they recognize its potential as outlined herein.

AI still has a way to go before it can truly shrink the contact center, and the same for expanding its role with intelligent automation.

However, with a thoughtful deployment strategy, the risks can be mitigated, especially by limiting customer-facing use cases.

More importantly, being an iterative technology, AI learns and improves over time. With some patience, today's aspirations will become reality: and can make the contact center more valuable to the business than ever before. 



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USING THE COACHING TOOLBOX

PRACTICAL STRATEGIES TO DEVELOP YOUR AGENTS.

Coaching isn't just a checkbox: it's a bridge. A bridge between where an agent is today and the untapped potential waiting just ahead.

Sometimes it's about helping a mediocre or good agent become a stand-out performer. At other times, it's a much harder conversation - one that, if handled correctly, can help someone course-correct before they end up on a performance plan - or worse.

But here's what I've learned: *coaching only works when we make it personal.*

That doesn't mean being soft or low-

ering expectations. It means seeing the human behind the headset.

Every coaching conversation is different because every agent is different. What helped Susie turn around her attendance issues might not move the needle for Jackie, who's struggling with adherence. Even if the issue appears the same on paper, the root cause, mindset, and motivation—all of that—are unique.

And truthfully? Each coaching session has taught me something as well. Like the game *Call of Duty*, it's pushed me to go back to the drawing board: rethink

my strategy, adjust my aim, and consider a different approach the next time. Coaching has made me sharper, more thoughtful, and more intentional.

Still, I know how tempting it is to avoid challenging conversations. Many of us are confrontation-averse, uncertain of how the agent will respond or how to say the right thing without escalating the tension. But if we delay, we miss the moment.

The best time for a coaching conversation is when both parties are calm and clear-headed - not overly emotional - and as soon as possible.

Avoiding it is like seeing a colleague with toothpaste on their face and hoping someone else says something. It might feel more comfortable in the moment, but the respectful, human thing to do is to speak up with care.

To build a bridge you need the right tools. And every location where bridges are built is unique.

In this article, I've highlighted some of the ones I've come to rely on that help shape the conversation to the individual. I hope you find them useful as you guide your teams, build trust, and strengthen performance: one coaching conversation at a time.

TOOL #1: SPEAK THEIR LANGUAGE: USING DISC

One of the biggest turning points in my coaching journey came when I realized this simple truth: not everyone thinks, acts, or responds like I do. And that's not a bad thing: it's just finding out what communication style works for the other person.

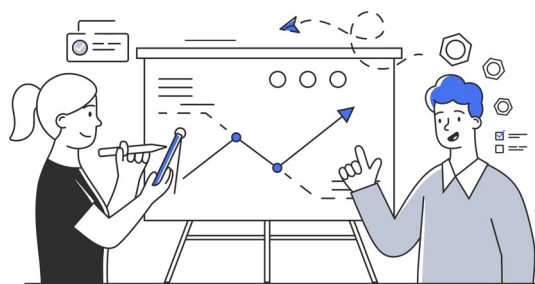
That's where the DISC model comes in (see **FIGURE 1**). Or as Thomas Erikson colorfully puts it in the *Surrounded by Idiots* book series, it's about understanding how people communicate based on four distinct behavior types: Red, Yellow, Green, and Blue.

Here is a simplified approach that I have adapted for call and contact centers:

I remember a coaching session with Janice, who is one of our experienced agents, but whose hold time was consistently higher than her peers.

At first glance, it looked like a performance issue. But I knew Janice; she wasn't careless or unmotivated. She was a strong performer in many areas, which made this trend a bit curious.

Through conversations and observation, I had a good sense of Janice's personality; she was a mix of Red (dominant) and Blue (conscientious). That meant she cared deeply about getting things right, but she also wanted to be in control and come across as competent with peers and callers.



So, I approached our conversation directly, not in a critical way, but with clarity and purpose. I told Janice, "Your hold time is higher than expected." I showed her the data for the month and even brought up a few specific calls from that day where the hold times were unnecessarily long.

As we talked, it became clear that the real issue wasn't that she was distracted or lazy. Instead, it was information overload.

Janice was placing customers on hold because she couldn't quickly locate the right resources or information.

Her desktop was covered in Microsoft Sticky Notes, with everything from system passwords to website links scribbled in different colors, all competing for her attention. Then she had two notepads filled with information, which she also used to help answer questions.

I didn't lecture Janice as I knew it would be of no use. Instead, I walked over to her desk and said, "Let's figure this out together."

I introduced her to OneNote: a simple digital tool that could help her organize and centralize all those scattered notes. Within minutes, she was copying her most-used links, key facts, and troubleshooting guides into a single, searchable document.

The result? By the following week, Janice's hold time was cut in half.

That experience reminded me of something important. Most people aren't just one color on the DISC spectrum. Janice had the drive of a Red and the structure-focused mindset of a Blue. That combination influenced how she processed information and how she responded to coaching.

And it's not always static. An agent might come across as a Yellow (influential) on the phone - energetic, chatty, full of personality- but shift to a Green (steady) style in team meetings, preferring to observe and maintain harmony rather than speak up.

THE DISC MODEL

Color (DISC)	Prefer to Think and Behave	Communication Preference	Coaching Approach	What to Avoid
Red (Dominant)	Fast, decisive, goal-oriented.	Provide direct feedback, respectful, and efficient.	Cut to the chase. Prioritize results, not small talk.	- Long-winded conversations - Overexplaining - Sugarcoating feedback - Questioning their authority
Yellow (Influential)	Energetic, expressive, social.	Uplift, encouragement, collaborative feel.	Lead with positivity. Invite ideas and acknowledgment.	- Harsh or cold tone - Overly rigid structure - Ignoring their input or cutting them off - Focusing only on numbers
Green (Steady)	Calm, loyal, team-oriented.	Stability, reassurance, gradual change.	Use empathy. Provide support. Avoid pressure.	- Being too forceful - Rushing them - Creating a tense or emotional environment - Making abrupt changes without explanation
Blue (Conscientious)	Analytical, structured, perfectionist.	Precise data, logical explanations, time to reflect.	Prepare facts. Explain "why." Avoid ambiguity.	- Vague or emotional language - Lack of structure or data - Changing expectations midstream - Pushing for decisions on the spot

FIGURE 1



The point is that coaching isn't about applying a one-size-fits-all template. It's about noticing what makes each person tick and then tailoring your approach to help them thrive.

TOOL #2: MOVING FROM STYLE TO READINESS: THE WILL VS. SKILL MATRIX

Understanding your agents' personality styles is a powerful first step. But knowing how ready they are to improve is just as essential.

That's where the skill versus will matrix comes in, which I have modified and broken down for call and contact centers, outlined in four quadrants (see **FIGURE 2**).

This simple yet powerful framework helps you diagnose where an agent is on their coaching journey by looking at two things:

- **Skill.** Do they have the ability and knowledge to do the job?
- **Will.** Do they have the motivation and mindset to apply it?

Once you understand both, you can coach more precisely: offering the right blend of support, challenge, or encouragement depending on where they land.

Let's see how these quadrants can be used:

- **High Will/Low Skill.** Think of a brand-new hire, bright-eyed and bushy-tailed, hitting their head against a brick wall trying to get the hang of your call center's CRM system. They're motivated but may flounder without guidance.

Your job? Teach with patience; they want to succeed. Consider pairing them with a mentor (an experienced agent) to learn the ropes.

- **Low Will/High Skill.** This one is trickier. Imagine an agent who knows the systems and information inside out but who rolls their eyes at feedback. Something's off. Burnout? Misalignment? Your job is to dig deeper and help them reconnect to their "why."

- **Low Will/Low Skill.** This agent has checked out. Maybe they weren't appropriately trained or felt they would figure it out when they started taking calls, or perhaps they're not a good fit.

Here, coaching will be challenging; most times, it falls on deaf ears and such agents will do their best to hold on until they find something to move on to. However, if it's a training issue, and the agents are willing to learn, there may still be hope to turn things around.

- **High Will/High Skill.** These agents are your MVPs. Don't ignore them because they're consistent.

Instead, invest in them like by offering stretch assignments (new assignments that push their skill level and challenges them to grow, such as leading team huddles or piloting a new system), mentorship, or leadership prep.

Using the Will vs. Skill Matrix in your coaching prep helps you match your strategy to their reality: and sets you both up for more productive, empathetic conversations.

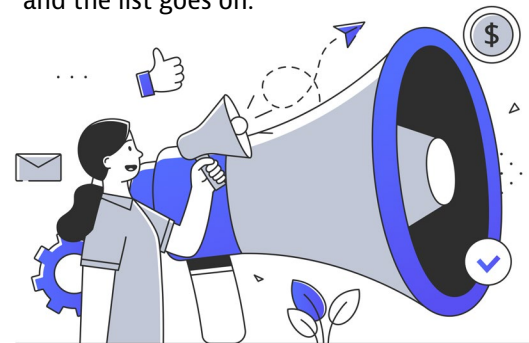
TOOL #3: WHAT FUELS THE FIRE

If DISC helps us understand how someone behaves, and the Will vs. Skill Matrix tells us where they are in their development, there's still one big question left:

Why do agents do what they do?

That's where what I call "driving forces", based on extrinsic and intrinsic motivation, described by Charlotte Nickerson, that I have modified for call and contact centers come in (see **FIGURE 3**).

In the fast-moving, high-pressure world of call and contact centers, it's easy to assume that everyone is motivated by the same things: recognition, bonuses, maybe a shot at promotion, and the list goes on.



WILL VERSUS SKILL MATRIX

Quadrant	What they need	Coaching Focus
High Will / High Skill	Trust, autonomy, and new challenges.	Empower and stretch them.
High Will / Low Skill	Training, encouragement, time to grow.	Teach and support them.
Low Will / High Skill	Re-engagement, recognition, purpose.	Inspire and reconnect them.
Low Will / Low Skill	Honest feedback, structure, potential consequences.	Reset expectations and evaluate fit.

Source: BiteSize Learning, modified by Mark Pereira

FIGURE 2

DRIVING FORCES

FIGURE 3

Type	Definition	Examples
Intrinsic	Motivation that comes from within the person. Often tied to personal values, satisfaction, or purpose.	– Pride in doing a good job – Enjoyment from solving problems – Personal growth or mastery – Feeling of purpose or helping others
Extrinsic	Motivation that comes from external rewards or pressures. Often tied to tangible outcomes or recognition.	– Bonuses or commissions – Pay raises or promotions – Recognition or awards – Fear of penalties or losing a job

Source: Charlotte Nickerson, "Extrinsic vs. Intrinsic Motivation: What's the Difference," *Simply Psychology*, modified by Mark Pereira

But in reality, motivation is deeply personal. Two agents might hit their targets for totally different reasons: one to feel competent and independent, the other to help their team make a difference in the world.

And when you don't know what drives someone, even the best coaching strategies can fall flat. Like trying to fuel a car with the wrong gas. You might mean well, but it's not going anywhere.

That's why taking the time to understand an agent's driving forces - the "whys" behind their behavior - can make a significant difference. It brings clarity to those challenging conversations, uncovers what they care about, and gives you a direct line to what inspires them to put in their best effort.

I remember meeting with an agent who consistently skipped her breaks and cut her lunch down to just 15 minutes. When I asked her about it, she explained, "Calls are waiting; I just want to do my part to help us meet service levels."

Her heart was in the right place. She genuinely cared about the team and the callers. But as we know, this kind of well-intentioned behavior can lead to burnout and even legal trouble.

Rather than confronting her head on, I took a different approach. I explained that adherence wasn't just a checkbox metric: it was an important performance metric that gets reported to the client.

I told her that skipping breaks might seem noble in the moment, but it lowers her adherence score and impacts the center's overall performance.

I also reminded her that, by law, anyone working an eight-hour shift is entitled to two 15-minute breaks and a 30-minute lunch. Not following that not only affects her wellbeing, but it also puts the organization at legal risk.

After our conversation, something shifted. She started taking her breaks and lunches on time and for the allotted durations.

EMPATHY: THE LEADERSHIP BRIDGE

I hope these tools serve you well in your coaching conversations: just as they've helped me over the years.

And here's one more piece of advice: always lead with empathy. It's the bridge that connects you with your agents, especially in challenging moments. Review the article on "[Why Empathy in Leadership Matters](#)".

Coaching isn't something most of us naturally excel at: it's a skill we build over time. I wish it were something you could learn once and be done with, but the truth is, it takes ongoing practice, reflection, and patience.

Every coaching moment - whether it's scheduled or spontaneous - is a chance to grow. Sometimes you'll hit a home run. Other times, you'll walk away wondering if it even made a difference.

But keep showing up. Because those small, consistent conversations are where *real* development happens. For you and your agents.

So, stay curious, stay empathetic, and most importantly stay calm and carry on coaching. 

EVERY COACHING MOMENT - WHETHER IT'S SCHEDULED OR SPONTANEOUS - IS A CHANCE TO GROW. SOMETIMES YOU'LL HIT A HOME RUN. OTHER TIMES, YOU'LL WALK AWAY WONDERING IF IT EVEN MADE A DIFFERENCE.



Mark Pereira is a certified Trainer and experienced On-Site Supervisor specializing in boosting retention and productivity through proven teaching methods. With an academic background in Business and Innovative Education, he provides coaching to agents with empathy and skill. He stays up-to-date with industry developments from his base in Indianapolis, Indiana.



ILLUSTRATION PROVIDED BY ADOBE STOCK

THE POWER OF POST-PURCHASE PERSONALIZATION

HOW AI CAN ASSIST EXCELLENT PRODUCT EXPERIENCES (PXS).

Businesses have no shortage of tools for acquisition and support. This pre-purchase phase is the playing field of many marketers where they can guide customers on their journeys, learn about their prospects, start relationships, and hopefully acquire new customers.

But that's where connection often breaks for physical goods brands. Unlike digital products, where real-time engagement data provides instant feedback, once the purchases of physical products are complete, many brands lose the connection with their customers.

Brands do not have visibility into how customers engage with these products, whether they are using them regularly, and if they are satisfied. And, critically, if they are running into challenges that impact their likelihood of repurchasing or spreading positive reviews.

Unfortunately, these lost connections with the customers are often never regained until a problem comes up or a special offer is presented. And then customer loyalty may not be as strong as it would have been had the brands been able to stay in touch with customers all along.

UNFORTUNATELY, THESE LOST CONNECTIONS WITH THE CUSTOMERS ARE OFTEN NEVER REGAINED UNTIL A PROBLEM COMES UP OR A SPECIAL OFFER IS PRESENTED.

WHY BRANDS CAN'T CONNECT

The driver behind this lost connection with customers is simply the lack of options. Many companies rely on emails, discount offers, and flash sales to re-engage after that vital first purchase.

But few tools exist to engage in helpful conversations as part of a personalized product ownership experience. As a result, brands often still rely on dated and asynchronous tools like surveys, focus groups, support tickets, and online reviews to understand the unique customer perspective.

Consequently, when businesses fail to form connections that enable them to:

- Gain information and data about the customers,
- Understand how customers are using the products (or not),
- And learn of any issues and questions customers might have,

they risk customer churn. They also fail to gather data for product innovation, new offerings, and for cross-/reselling.

The results for many retail brands are not great. From what we've learned, many new customers are lost within the first 90 days of purchase. Retailers are stuck in constant, costly searches for new buyers while losing valuable ones.

So, what should brands do?

- Brands need to shift their focus from reactive problem-solving to proactive product experience (PX). With the product and the customer at the center, they can gather, apply, and instantly act on that information.
- This usage data can be shared across all their systems to build stronger relationships with customers on their customer experience (CX) journeys.

PX: PUTTING BRANDS AND CUSTOMERS TOGETHER

Today, many customers struggle during unboxing – that first moment where expectation meets reality – as well as making the all-important shift from new and novel to a daily habit.

The key for providers of physical products – from smoothie boxes to e-bikes – is to maintain a connection with customers. Right through the critical phases of unboxing, usage, care, and maintenance, and upselling/reselling.

PX is all about making and maintaining hyper-personalized connections to customers during their ownership experience. It requires that brands maintain and interact with customers in a way that understands both their usage state and the specific products they purchased.

PX IS ALL ABOUT MAKING AND MAINTAINING HYPER-PERSONALIZED CONNECTIONS TO CUSTOMERS DURING THEIR OWNERSHIP EXPERIENCE.

Delivering hyper-personalization at scale utilizes AI to marry customer-specific information (skill level, preferences, usage patterns, even things like skin type or personal goals) with:

- Product information,
- Known usage issues,
- And even environmental information,

to provide an experience that is helpful, timely, and aligned with the brand.

For example, if you sell specialty health juices and a new customer makes a purchase, chances are that you know little about them. You probably are not aware of the customer's tastes and preferences or their goals in drinking the juice.

Similarly, the customer may not know how to use the product in an optimal way and (most importantly), if they will purchase from you more than once.

In this case, a good PX journey, delivered as a digital assistant, starts with an expectation setting. Like alerting the customer to the delivery date, refrigeration needs, and any tools they'll need in the kitchen to make the juice taste optimal.

Once the order arrives, a good PX engagement strategy will engage the customer to help them get started and to learn more about how they plan to use the product and why.

With this information, you can make personalized recommendations about when to drink the juice and offer suggestions around broader wellness goals.

Bottom line:

PX is about meeting the customers where they are at. This helps brands get ahead of common problems by ensuring that the customers are prepared to make the most out of their products. Also, it alerts them to new offerings and to helpful advice. All things that help brands stay closer to their customers.

PX AND CX: WHAT'S THE DIFFERENCE?

In short, the biggest difference between CX and PX is that CX predates the purchase and PX is post-purchase.

For brands with digital products and services (think Netflix, Kayak), there isn't much of a delineation. These brands remain in constant contact with their customers throughout their usage.

This ability to stay connected to customers throughout the full customer journey is a major advantage. It is one of the reasons why digitally-native offerings have considerably higher retention rates.

For product brands, CX gained importance as purchasing patterns shifted from in-store to online. Over time, ensuring customer satisfaction became integral to formalizing retention strategies and quantifying the customer's overall experience.

PX bridges the gap between initial purchase and when a customer reaches out for support due to a problem, or worse, simply never comes back.



The goals of PX are to guide onboarding and initial usage, establish patterns of usage, enable feature discovery, produce support and education, and anticipate common problems *before* they happen.

OVERCOMING PX CHALLENGES

The difficulty with PX is that traditional marketing and support tools aren't designed to guide and support customers in their product use. Thus leaving brands with critical post-sale connections gaps. The missing piece is creating this connection in a way that enhances customer engagement and satisfaction.

Let's take a closer look at each of the challenges of PX and how brands can overcome them.

- 1 Some companies try to piece together solutions using the systems they already have. The problem is that most of those applications weren't built to respond in real time to customer interactions.

That's why many are now turning to AI-based platforms that can learn from each exchange and adjust automatically.

For instance, if the system recognizes that someone is new to a skin care line, it might share simple tips to help them build good habits and make application easier. If it sees that a customer already has an established routine, it can suggest adding a serum for better results.

Even though the intelligence behind a PX platform is complex, the delivery to customers can be simple. It might be as easy as a text message with a link to helpful content or a short video showing exactly how to get started.



The goal is to make it effortless and enjoyable for customers to get the most out of your product or service.

- 2 There are very few tools that collect zero-party data (data your brand collects directly from customers and can be used to drive future interactions with them). But when brands gather insights directly from a product's usage, the benefits can be game-changing.

Zero-party data, collected passively through customer interactions rather than impersonal surveys, provides real-time visibility into customer behavior: without interrupting their experience.

The challenge lies in earning that data. This data depends on customer trust and voluntary participation; people share information when they believe it will improve their experience.

For example, sending texts asking how the initial experience has been can build on the relationship, not just the transaction. Along with providing additional resources, next steps, and/or connecting them to a community via social media or forums.

- 3 PX strategy should be designed to provide visibility into individual customer issues that can be resolved before the customer has to escalate them or worse, before a customer is lost.

The key is leveraging a responsive system that properly responds to customer queries, thanking the customers who are doing great (and maybe asking for a review). And then simultaneously funneling and supporting those customers who are struggling.

The best applications utilize AI to direct customers down the path to support that they need to be successful.

- 4 Most brands still operate in silos, where marketing, CRM, support, and product data don't connect in real time. As a result, brands may deliver a suboptimal experience or miss

opportunities to cross-sell or upsell happy customers.

The solution is to connect these systems through integration points that allow information to flow freely. This approach doesn't just improve CX: it also makes marketing campaigns more targeted and effective.

At the same time, by addressing issues proactively and streamlining interactions, brands can reduce support costs, freeing resources for growth and innovation.

...WHEN CUSTOMERS FEEL SUPPORTED...THEY, IN TURN, DEVELOP LONG-TERM USAGE HABITS...

WHY A PX STRATEGY?

A solid PX strategy can help brands identify and resolve issues faster, inform product roadmaps based on real-world usage, and develop smarter cross-sell and retention strategies. It can engage with customers in a way that builds loyalty and trust and expands word-of-mouth and review opportunities.

When brands connect with customers through personalized interactions, guided usage experiences, and predictive support, retention and loyalty are built.

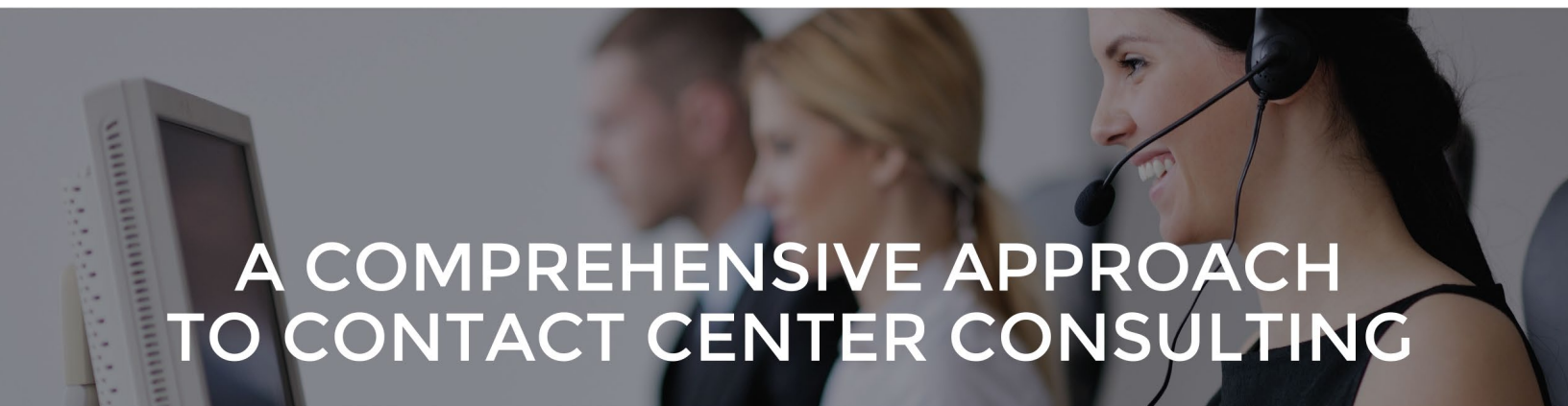
And, when customers feel supported throughout their product journeys, they, in turn, develop long-term usage habits that turn them into lifelong advocates.

McKinsey's [research](#) shows that contextual, personalized cross-selling can lift revenues by 15%–20% and that companies excelling at personalization generate significantly higher loyalty and growth.

In practice, when customers feel seen and valued, they're far more likely to renew their subscriptions or make those all-important second purchases. 



Ken Rapp is CEO of BluStream, the leader in after-sale product ownership experiences. He is a dynamic entrepreneur and commercialization leader. He's founded businesses, created markets, and provided significant returns to shareholders. Ken is passionate about marrying unmet needs with practical solutions and specializes in enterprise value creation through commercialization.

A background image showing a call center environment with several agents wearing headsets and working at computers.

A COMPREHENSIVE APPROACH TO CONTACT CENTER CONSULTING

The outcome you can expect?
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DEFINE

Strategy and Vision
Assessment
Recommendations
Roadmap



PLAN

Requirements
Sourcing Options
Vendor Evaluation
Business Case



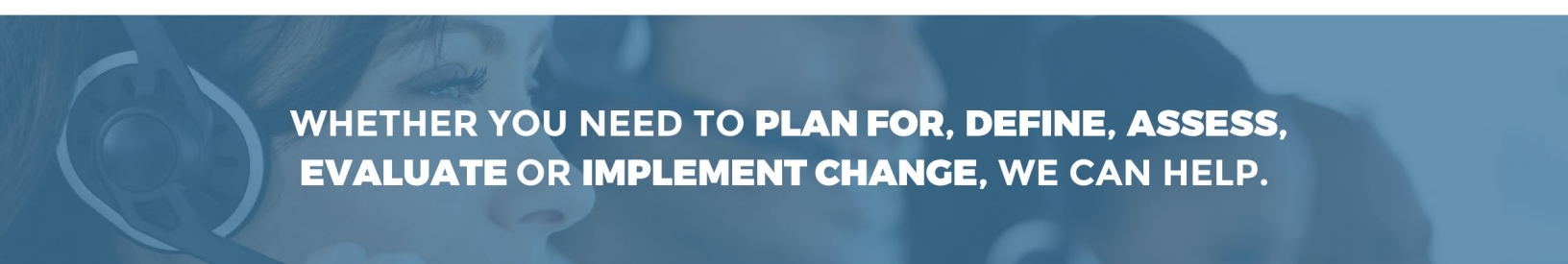
IMPLEMENT

Project Plan
Design/Development
Testing
Pilot and Rollout



OPTIMIZE

Operations
Technology
Support Models
Monitoring & Management

A background image showing a close-up of a call center agent's face wearing a headset.

**WHETHER YOU NEED TO PLAN FOR, DEFINE, ASSESS,
EVALUATE OR IMPLEMENT CHANGE, WE CAN HELP.**



ILLUSTRATION PROVIDED BY ADOBE STOCK

REPAIRING MISSED CUSTOMER CONNECTIONS

HOW TO JOIN AUTOMATION AND AGENTS.

With the surge of AI and automation, it's never been easier for brands to invest in new ways of connecting with customers. But at what risk?

Every interaction is a chance to build or lose trust. Despite years of investment, many customers still walk away frustrated.

Our research found that more than half only resolve their issues on the first try if they reach human agents. At the same time, many say self-service fails them by not offering a clear path to a person.

The message is clear: technology alone won't save the contact center. Customers expect both efficiency and empathy.

To meet those expectations, organizations must strike the right balance between automation and human connection. It is time to leverage the best of both to drive resolution, loyalty, and trust.

THE PROBLEM WITH SELF-SERVICE

Too often, brands launch self-service tools without considering how they work in real-world scenarios. Our findings show half of consumers avoid them when issues feel complex or urgent. And when they are stuck, escalation to a person often feels like hitting a wall. In fact, 66% of consumers actively avoid asking a human employee for help.

Technology should be a bridge, not a barrier. That means regularly auditing self-service journeys to ensure they're intuitive and include seamless handoffs to people when needed. Customers should *never* have to start their story from scratch.

Self-service tools have certainly been evolving and gaining traction: when they don't, customers are left even more frustrated, with some abandoning the brand entirely.

Every investment can and should be measured by how well it reduces friction for both customers and agents. If escalation isn't fast and handoffs aren't smooth, the technology isn't working.

The digital brands we work with use data to drive personalization for consumers at scale through automated chat, speech-enabled IVR, or proactive contact center outreach when the frustration can't be solved with self-service.

We've found the best natural language processing (NLP) solutions are informed by the customer's history and remove endless loops of menu-based interactions. Instead, they short-circuit to fulfill needs directly.

Self-service journeys need to be reviewed and understood on a regular basis. Ask yourself:

- How do different customers reach out for help?
- Is our site missing information?
- What simple personalized questions can we answer?

Digging deeper to broaden beyond the standard FAQ can be the difference between a contact center overload and a more managed support system.

WHY HUMAN EMPATHY STILL WINS

Customers interact with contact centers on average 14 times a year, according to our research. That should mean 14 chances to build relationships. Yet too often, it's 14 chances for frustration: long waits, repeating the same stories, or chatbot loops that go nowhere.

The stakes are high. More than 60% of consumers have said they have stopped buying from a brand due to poor support. If a customer is calling, they want to feel heard, not rushed through a script. This is how brand loyalty and customer retention are built.

But too often, agents aren't given the tools or incentives to deliver that. Empathy breaks down when an agent lacks visibility and contact center metrics are focused on those that measure performance, but which are not directly connected with customer outcomes.

It's not that performance metrics like average handle time (AHT) and call volume (the number of calls per hour) aren't important. But they lack an understanding of if the issue was resolved and how that issue impacts the business.

The issue isn't a lack of data. It's a lack of real-time visibility and incentives to do the right thing.

What if an agent knew a customer had already called five times and knew what issue they'd been having. How could that change the conversation?

It builds an experience that is less of the "press 1 for billing" and more of: *"I see you're having an issue paying your bill online. Let me transfer you to someone who can help with that,"* which could de-escalate a customer's frustration and improve outcomes overall.

On the measurement side, it opens up possibilities to focus on call resolution versus call time metrics and to connect cited issues back to other digital teams to quantify its impact and prioritize a fix to the digital experience, if needed.

AI is now being used to provide context across channels. For example, a customer service rep (either human or agent) can reach out by chat to intercept a frustrated customer struggling online and pull in account data to infer what they may be trying to do. One telecom company even developed agent-based troubleshooting guides to enhance self-service success.

When a customer reaches a live agent, however, there's a huge opportunity to build loyalty and satisfaction. AI can surface key insights to make agents more empathetic and knowledgeable: not less.

Organizations taking this approach are already seeing shorter call times and higher satisfaction. Customers value resolution more than speed alone, and knowledge-empowered empathy makes resolution possible.



BECOMING AN INSIGHTS ENGINE

For too long, contact centers have been treated as cost centers. In reality, they are powerful sources of customer insight. Every unresolved digital task or confusing self-service path shows up in the contact center first.

In the past this valuable insight remained in a silo, with no way to connect back to actual digital fixes. The use of technologies like AI are helping to change that.



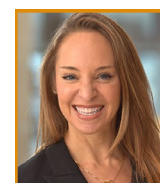
Take one healthcare provider. Call volume was spiking, but surveys didn't explain why. Customers didn't say, "your site is broken," they just called out of frustration. But by connecting contact center data with digital behavior, the company discovered the real issue: a key web page wasn't loading. Fixing the page reduced calls and boosted satisfaction.

When contact centers are treated as insight hubs, agents become frontline sensors for digital experience issues. Empowering them to flag recurring problems, and feeding those insights to digital teams, creates a cycle of continuous improvement that reduces call volume and strengthens customer journeys.

THE PATH FORWARD

The future of the contact center isn't about choosing between people and technology. It's about combining the best of both.

Automation without empathy leaves customers stranded. Agents without context feel ineffective. But when the two are integrated, customers feel seen, supported, and valued. And that kind of support isn't just an upgrade. It's the foundation of loyalty, trust, and growth. 📍



Ricki Lang is Vice President of Telecommunications and Media at Quantum Metric where she leverages her deep expertise in data-driven insights and digital optimization to transform the customer experience for industry-leading clients. Ricki partners with them to enhance operational performance, streamline customer journeys, and drive growth across the digital ecosystem.

...ORGANIZATIONS MUST STRIKE THE RIGHT BALANCE BETWEEN AUTOMATION AND HUMAN CONNECTION.



ILLUSTRATION PROVIDED BY ADOBE STOCK

AI CAN BOOST SALES AND SERVICE PERFORMANCE... BUT ONLY IF WE STOP AUTOMATING THE WRONG THINGS.

AI has been hyped as the silver bullet for customer service and sales, and nowhere more than in chatbots. The promise was simple: let machines handle customer contact so humans don't have to.

But the reality has been far less elegant. People can smell a bot from a mile away, and nothing kills trust faster than a canned AI response, especially in sales, where the goal is to ask customers to part with their hard-earned money.

The irony is that while companies pour resources into teaching AI to build

relationships (the one thing it's still objectively terrible at), they ignore the real bottleneck strangling performance: information overload.

Customer service and sales are execution-heavy jobs. Great teams succeed by talking to people, adding value, and moving fast: not by deciphering endless dashboards and Excel dumps.

Yet most organizations bury their teams in data while outsourcing the work they're actually good at to "virtual agents." By the time reports or KPIs arrive, they're already outdated or too granular to act on.

Faced with this flood of unusable information, both reps and managers tune it out and get back to what they know best: winging it. The result? Paralysis.



**...NOTHING KILLS TRUST
FASTER THAN A CANNED AI
RESPONSE...**

Human-centric processes rarely fail due to a lack of data. They fail because the wrong data, delivered the wrong way, turns potentially valuable insights into noise.

We've now reached a crossroads where too much of the wrong information is intersecting with inefficiently used AI. We must stop confusing automation with intelligence; AI should be used to *amplify* human performance, not *replace* it.

A FORK IN THE ROAD

Anyone who's ever interacted with an AI bot knows you can get around it by demanding to speak to a human.

This means most people who encounter real people in contact centers come with one of two scenarios. A: they were already upset by being met by a chatbot and are in a bad mood. Or B: the chatbot didn't give them the correct answer, either because of bad prompts or insufficient background data.

In both cases, the customer representative is starting the conversation with someone who's already in a bad mood: and with limited information about why they got in touch in the first place.

A simple answer to this problem is to avoid AI tools altogether. But that would mean walking away from one of the biggest productivity revolutions in human history.

The choice isn't *whether* to use AI, but *where* to use it. Do we automate human interactions? Or do we automate the friction around them – the overload, the lag, the guesswork – so as to focus on what humans do best? That choice will determine which companies pull ahead in the next decade.

SHOULDN'T AI TAKE CARE OF THE "GRIND"?

Indeed, the ideal AI doesn't replace salespeople. It removes friction so they can perform at their best. Used properly, AI can:

- Surface real-time insights as they happen so reps can act instead of analyze.

- Transform endless dashboards into a single clear recommendation with the next right steps to take.
- Handle the data crunching and pattern recognition that machines excel at, while leaving the trust, context, and negotiation to people.
- Scale human outreach without turning it into spam, helping prioritize who to contact and when, thereby making communication timelier and more relevant.



Some will argue that automating outreach is the smartest way to use AI in sales. Why rely on one rep to write 50 emails a day when an AI can send 5,000?

In that view, sales is a numbers game; more messages mean more meetings and more meetings mean more deals. Prospects might roll their eyes at yet another bot-written pitch, but if even a small fraction converts, the math still works.

However, this logic misses the bigger picture. *What looks efficient in the short term erodes credibility in the long term.*

Just as inboxes became immune to cookie-cutter cold emails, they'll quickly tune out AI spam. Unlike cold calling, trust is far harder to rebuild once prospects learn to filter out the noise.

While AI-generated outreach might yield a bump in meetings, the cost is cumulative. Every impersonal message teaches your audience that your brand isn't worth listening to.

AI AS EXTENSION OF THE MIND

To overcome this, we must treat the new tools as an extension of our minds. A storage cache where we can easily retrieve the data we need and get the big picture whenever we need it.

Whether it's a specific customer or a broader strategy for upsell and customer satisfaction, having access to all the company's data in a "second brain" is critical to make a better organization. A perfect AI for sales and customer support does not talk *for* the reps. Instead, it strategizes *with* them.

After all, the human brain is better than any other system at retrieving information quickly. Millions and millions of impressions can be brought to mind whenever a person wants to relive a moment or make a decision.

What the brain lacks is storage capacity. With thousands of data points from various sources, we have to make lists to keep track of them all. And when there are tens of lists with thousands of data points, we simply can't do it.

For reps, this would mean access to insights about specific customers or prospects that they would otherwise not have time to look for. For managers, the ability to access the right data whenever they need it will give them both more time and better insights.

In other words, sales does not need AI to talk *for* people. It needs AI to *think with them*.

“...[SALES] NEEDS AI TO THINK WITH THEM.”

Instead of dumping spreadsheets or dashboards on a team, AI can synthesize the noise and surface the few insights that actually matter. Namely who's warming up, who's about to churn, and which activity today will move the needle.

That's the leverage point: a layer that makes data usable in real time. When it works this way, automation amplifies the human in the loop, rather than reducing their role.

In the end, the sales teams that win with AI won't be the ones that replace their people. They'll be the ones who finally free them to do their best work. The future of sales isn't automation; it's amplification. 



Sindre Haaland is the founder and CEO of SalesScreen, a leading sales gamification platform which he established in 2014, combining his technical expertise with an entrepreneurial mindset. Under Haaland's leadership, SalesScreen has grown into a global company with a presence across Europe and North America.

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ILLUSTRATION PROVIDED BY ADOBE STOCK

ONLY A CX "BAND-AID"? AI CAN BE TRANSFORMATIVE IF DONE RIGHT.

When people talk about automation, including customer experiences (CXs) powered by AI, it often comes with dramatic headlines: jobs disappearing, customers shocked and awed, entire operations reshaped overnight.

The reality for most businesses' contact centers has been relatively mundane. They're using automation as a "band-aid": slapped onto flawed systems as quick fixes rather than used to fulfill its real promise.

Let's be clear. The band-aid approach may help your organization survive for the next month (or maybe even the next quarter) but it is a disaster over the long term.

Even worse, it will never get you to the point where you're reaping the full benefits of automation. Namely gaining control over contact center operations (including their costs), building customer loyalty, and delivering revenue-generating experiences.

TURNING AUTOMATION INTO TRANSFORMATION

Layering AI on top of flawed systems doesn't solve problems. Instead, it generally makes them worse, with results ranging from hallucinations and inconsistent answers to frustrated customers and lost business.

To continue the medical metaphor, scaling up AI and automation initiatives

without the proper data infrastructure, planning, security procedures, and partners are cures worse than the disease.

LAYERING AI ON TOP OF FLAWED SYSTEMS DOESN'T SOLVE PROBLEMS. INSTEAD, IT GENERALLY MAKES THEM WORSE...

That doesn't mean you should halt your AI investments. When done right, such automation can be transformative in the contact center. This comes to life not in the dramatic "robots take over" sense but in real ways that support better outcomes for both your customers and your bottom line.

For example, we all know that voice AI can take on repetitive, high-volume tasks and free up human agents to focus on the moments that actually require empathy and judgment.

But the impact may be far larger than you think. These solutions can scale to handle the workload of over 1,000 full-time employees. This is a truly transformational, enterprise-scale impact.

WHERE AI-BASED AUTOMATION HELPS

One of the greatest results that our customers see from this kind of investment in smart AI-based automation is that it helps them reestablish control over incredibly complex systems.

Take customer service policy updates, for example. Rolling out a new compliance script across thousands of human agents is a slow, messy process.

With AI, those changes can be deployed instantly and consistently: without the risk of someone going off script. Automation also brings visibility: you know exactly what's being said to customers without digging through endless transcripts or hoping for consistency across shifts.

Another area where automation gives you back control is all too familiar to contact center leaders: volume spikes and surges. The applications here may stress you out, but I name them to show the breadth of use cases that can be solved with it.

- If you're at a utility company, a natural disaster will have your customers calling you constantly.



- If you're at a travel or hospitality company, disruptions to global flight patterns will do the same.
- And if you're at a retail company, you count on holiday shopping every year, with all of the questions, complaints, and returns that it entails.

The results speak for themselves. For example, one of the world's top utility companies takes millions of calls every year. But understandably, these sometimes rise up to 1 million per day when outages strike.

When it adopted our AI-driven automation technology, the voice agent they used to talk to customers successfully contained 15% of calls on the first day.

Since then, that overall containment figure has reached 67%, leading to better outcomes for both sides of the conversation. In fact, customer satisfaction has increased by 22%.

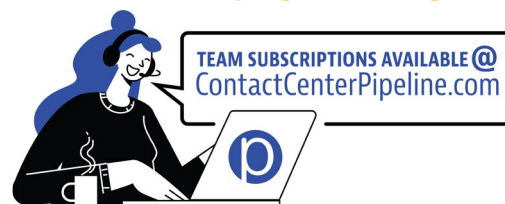
...AI AGENTS ALLOW YOU TO MORE EASILY HANDLE DRAMATIC UPTICKS IN CALL VOLUME WITHOUT THE NEED TO INCREASE HEADCOUNT.

AI AND PEOPLE WORKING TOGETHER WITHOUT BPOS

In all these cases and more, AI agents allow you to more easily handle dramatic upticks in call volume without the need to increase headcount.

Compare this with a seasonal or temporary workforce, where every new person requires hours of training on your business and brand voice. Not to mention the risk of them misremembering information or deviating from their talking points. Talk about putting a band-aid over a problem!

In contrast, AI agents can contain a huge chunk of call volume with consistent and on-brand responses. This helps decrease employee burnout, slash customer wait times, and gain control over both unpredictable and predictable surges.



To name just one more benefit, automation can increase your command over your contact center by bringing outsourced business processes back in-house.

For many CX leaders, using a third party for contact center operation was the only path available due to budget constraints. But with smart automation, you can nurture your relationships with customers directly, thereby strengthening trust in your brand and increasing loyalty over time.

There is certainly a place for BPOs in the age of AI, but it's time to think about clawing back parts of your relationship with your customers.

With AI agents taking on a greater share of conversations, you no longer have to make BPO-related quality and control trade-offs that can hurt how customers perceive your brand.

DON'T LET THE HEADLINES DISTRACT YOU

Technology should not be built and bought for technology's sake, but to fix real problems. AI has moved on from the curiosity, creation, and proving stages to real-world successful deployments that we're seeing.

But as with any important tool, AI is only as valuable as the processes and methods to support and enable it. Just like life-saving medical tools are only as good as the materials they are made of and the skill of the medical professionals who insert them.

The dramatic headlines about AI and automation may persist in the newspapers, but you don't have to fall for the hype or be scared of investing in smart use cases for automation.

We're of the belief that the more you automate, the more you own; and there's nowhere that's more true today than in the contact center. 



Michelle Schroeder is Chief Marketing Officer at PolyAI, a leader in enterprise conversational AI, where she leads global marketing strategy and helps enterprises achieve better outcomes from their AI investments. She has nearly 20 years of experience driving end-to-end marketing organizations at leading AI, customer experience, and customer relationship management companies.



AI WON'T SAVE YOUR CONTACT CENTER

FIRST, ELIMINATE THE PREVENTABLE CALL VOLUME.

Every contact center leader feels pressure to modernize by adopting AI, digitizing everything, reducing costs, and improving customer experience (CX). But before you optimize, automate, or modernize anything, you need to confront a hard truth:

You cannot optimize a contact center until you eliminate unnecessary contacts.

This isn't a technology problem. It's a discipline problem. And it requires leaders at every level—supervisors, managers, directors, and VPs—to stop normalizing avoidable volume and start treating it as what it truly is:

A signal that something upstream is broken.

Across industries, 20% to 40% of inbound customer contacts are preventable. This range aligns with what I have seen for more than 25 years advising telecom, banking, retail, and technology organizations, and it mirrors patterns highlighted in research from Gartner, McKinsey, SQM Group, and COPC.

The proportions vary by company and sector. But the theme remains consistent: a significant share of contact volume is driven by upstream friction, unclear processes, and preventable breakdowns.

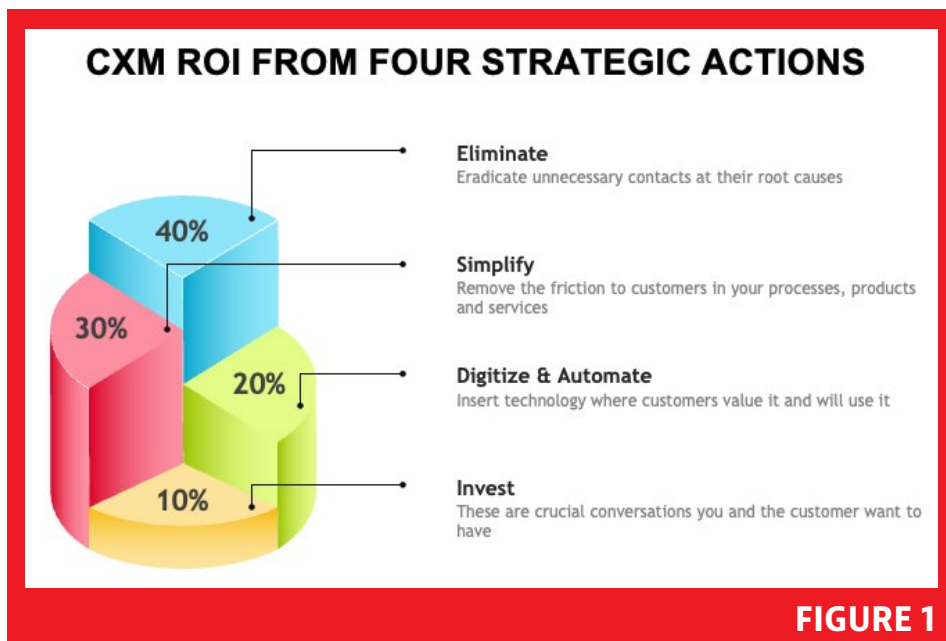
FIGURE 1 illustrates the proportions of contact reductions I see most often when applying customer contact optimization (CCO) methodology.

While the exact percentages vary by organization, the pattern is stable: roughly 40% of contacts can be **eliminated**, 30% can be **simplified**, 20% can be **digitized or automated**, and 10% should be **elevated** as high-value human conversations.

This model helps leaders target unnecessary demand while strengthening the interactions customers value most.

These four strategic actions drive measurable CX management (CXM) ROI, but *only* when leaders first understand the root causes behind their volume.





And that's where most organizations still struggle.

THE POWER OF KNOWING CUSTOMER INTENT

Industry has finally caught on that "tracking a score" or "sending a survey" isn't telling leaders what's actually broken.

Instead, businesses must stop flying blind and get to the fundamental drivers of customer frustration, cost, and churn by asking "Why?" at a deeper operational level.

The contact center is the only place in the business where customers tell you, in their own plain language, what's not working. But many organizations still bury those insights under hundreds of reason codes, legacy taxonomies, and inconsistent agent tagging.

If leaders want real change, they need a different lens:

Customer intent

Not "billing-issue-37A."

Not "workflow exception."

Intent

Ask: "What did the customer say about why they disrupted their day to contact you today?"

The answer, often revealed by customers within the first 30 seconds of a call, tells you whether the interaction should be:

- Eliminated

- Simplified

- Digitized

- Or elevated as a high-value human conversation.

This is the heart of CCO, built directly on the value-irritant matrix (VIM). This underused discipline separates what customers value from what irritates them, and what the business values from what irritates you.

When you analyze contact this way, patterns snap into focus. And those patterns reveal where your true ROI lives.

THE HIDDEN COST OF "INVISIBLE" VOLUME

Let's start with a simple, painful truth:

Most contact centers absorb the mistakes of the business.

Consider telecommunications. Studies from J.D. Power, Deloitte, and the American Customer Satisfaction Index (ACSI) consistently show that billing issues are among the top drivers of inbound call volume for telecom providers.

In my advisory work, these patterns commonly account for 30% to 40% of total demand, stemming from confusion, unexpected charges, expired promotions, or unclear fee presentation.

If the bills were clearer and easier to understand, many of those calls would disappear. Yet leaders still ask:

"Why is our handle time up?"

"Why are agents struggling?"

"Why is our digital self-service underused?"

Because the problem isn't the contact center.

It's the design of the bill.

And this pattern repeats in nearly every industry:

- Banking applications are too long.
- Retail makes checkout or returns too complex.
- Tech companies hide support options behind login requirements.
- SaaS platforms bury core features three menus deep.
- Deliveries arrive late or incomplete.
- Products ship with broken or missing parts.

CUSTOMERS DON'T WANT TO CALL. THEY CALL WHEN THE BUSINESS MAKES SOMETHING CONFUSING, RISKY, OR SLOW.

Customers don't want to call. *They call when the business makes something confusing, risky, or slow.*

DIGITIZATION WITHOUT DISCERNMENT WILL BACKFIRE

Digital containment fails when leaders deploy it to reduce cost, not to improve customer success.

One large North American telecom I worked with invested millions in automation, calculated savings from reduced call volume, cut headcount before launch, and then watched volume rise as customers grew angrier.

Why?

Because they applied a one-size-fits-all solution to every customer intent and optimized the wrong work and channel.

- Your 85-year-old mother does not want a chatbot.
- Your digitally-fluent customer does not want a 20-minute phone call for a password reset.

Digitization succeeds only when leaders align specific intents with the channels customers will actually adopt.

Adoption is the ROI: not the technology.

SIMPLIFICATION: THE FASTEST PATH TO REVENUE

Simplification may be the most undervalued strategic action. Industry case studies show that:

- Best Buy redesigned its online check-out experience over 17 years ago and

added more than \$300 million to its top line and that was within the first year. Imagine how much more this improvement has benefited the retailer since then!

- Discover Financial Services cut a 14-question credit card application down to seven questions and, according to a personal source familiar with the project, it saw application volume multiply several times over.

These examples show what happens when organizations challenge internal assumptions. When teams remove unnecessary steps and reduce friction, customer adoption increases, and revenue often follows.

But simplification requires leaders to challenge every field, form, policy, and approval chain. It means asking:

“Why do we need this step?”

“Who uses this data?”

“What happens if we remove it?”

Most organizations don’t do this work because it disrupts entrenched processes. When they avoid it, they shift complexity onto the contact center, and contact volume rises.

Simplification drives both cost reduction and revenue growth. And it is often the most powerful lever in the entire stack.

INVESTING IN THE CONVERSATIONS THAT MATTER

Elimination and simplification are not about removing humans from CX.

Far from it.

The most innovative companies double down on human conversation where empathy, trust, safety, or financial decisions are involved.

American Express is a prime example. Despite significant investments in digital self-service and AI, Amex continues to differentiate by offering live-agent support for high-value situations where customers expect expertise and human judgment.

These interactions—fraud concerns, travel disruptions, financial guidance, complex account issues—are not candidates for automation. *Instead, they present opportunities to build loyalty.*

The art is knowing which conversations to elevate, not eliminate.

High-value interactions deserve human expertise:

- Insurance claims
- Mortgage and lending decisions
- Travel planning
- Estate and legal guidance
- Complex financial service needs
- Medical treatments

If everything becomes automated, nothing feels personal: and differentiation disappears.

YOUR CONTACT CENTER...IS A STRATEGIC INTELLIGENCE ENGINE... IF LEADERS ARE WILLING TO LISTEN.

YOUR CONTACT CENTER ALREADY KNOWS THE TRUTH

Every unnecessary contact is a diagnostic clue.

Every preventable call is a cost driver.

Every repeated issue is a visible root cause that the business hasn’t fixed.

Your contact center is not a cost center.

It is a *strategic intelligence engine* that provides the earliest indicator of where your business creates friction.

If leaders are willing to listen.

CCO and VIM offer a disciplined way to see those signals, quantify value, eliminate the noise, and elevate what matters most. But the first step is the most important:

Eliminate unnecessary contact, and your optimization strategy finally works.

Your contact center is already telling you the truth.

The question is whether you’re willing to hear it: and act on it. 🗣️



Jeff Sheehan is a CX Advisor and Customer Service Strategist who helps organizations turn their contact centers into strategic performance engines. Jeff specializes in root-cause-driven operational improvement using the Value-Irritant Methodology. He can be reached at jfs@jeffsheehan.net or www.cxjsconsulting.net.

THE FOUR STRATEGIC ACTIONS: A PRACTICAL SIDEBAR FOR LEADERS

This article, with its illustration (see **FIGURE 1**), examines how leaders can reduce unnecessary contact and strengthen high-value interactions.

Eliminate → Simplify → Digitize & Automate → Invest

Each action ties directly to ROI.

- **Eliminate:** Reduce preventable volume at its root causes.
- **Simplify:** Increase adoption, reduce friction, lift revenue.
- **Digitize:** Apply AI where customers value speed and predictability.
- **Invest:** Strengthen the conversations customers see as strategic.

This framework helps teams align their work with operational and financial outcomes without vendor bias or technology-first assumptions.



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REPAIRING THE CONTACT CENTER SAFETY NET

HERE'S WHY IT'S TORN AND WHY IT MUST BE FIXED.

If everything worked, customers would rarely get in touch. The contact center catches what other processes and departments drop.

Even the simplest contacts, such as "When is trash collection day?" or "How do I reset my password?", often trace back to a failure in how the customer is informed elsewhere. Or to a process that is breaking.

Complex calls are often caused by failures in more niche processes. Some are easy fixes; some will always require human intervention.

Contact center leaders have known where things are failing in the business

for years. But it has been too nebulous to analyze cost-effectively and too internally politically contentious to drive change. Here are several examples:

- Sampling missed the scale.
- Manual QA could not keep up with the sheer volume of interactions.
- Taxonomies went stale.
- Search was brittle.

As a result, contact centers managed the symptoms of these broken processes, but the root causes lived on.



CONTACT CENTER LEADERS HAVE KNOWN WHERE THINGS ARE FAILING IN THE BUSINESS FOR YEARS.

Even when a problem is deeply damaging to the business, there are too few credible data points to make a compelling case for resource prioritization. And too little understanding of what goes on behind the scenes to link problems to a common cause.

This leaves the contact center stuck as a cost center: the price the business pays for all the messy, broken processes it has not fixed elsewhere.

The contact center leaders know the problems, but they haven't been able to solve the root causes.

THE CHALLENGE, REFRAMED

This has always been a challenge, and lately it is getting harder. Interaction volumes rise relentlessly, while budgets do not. Customers expect more, product and policy change is constant, and channel sprawl makes the picture more complex. The net is carrying more weight with fewer stitches.

Here is the good news. The conditions that kept the contact center out of the root cause conversation are shifting. Leaders now have the tools, data, and mandate to do more than "handle the calls." They can fix the system that *creates* the calls.

Customer service and the contact center are now C-suite discussions. Boards are paying attention. AI is forcing change, but it is also giving leaders an opportunity to guide that change and reframe the conversation.

Change is coming. But how the leaders manage it will determine whether the contact center remains a torn safety net.

DATA AVAILABILITY HAS CHANGED

For years, the story from the front lines was compelling but anecdotal. Contact center leaders had transcripts in pockets, flagged calls, sample QA scores, and embedded operators with rich experience.

What they lacked, though, was total visibility across interactions, with enough precision to quantify the impacts and enough currency to survive a budget meeting.

That is now available. The unstructured mass of conversations, messages, and case notes can be captured, searched, clustered, and trended at scale.

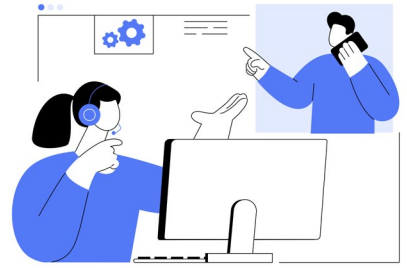
- Modern speech and text analytics unlock who said what, where, and why.
- Generative AI tools summarize long interactions into crisp, comparable records.
- Topic detection groups emergent issues that would never have been named in static taxonomies.
- Continuous QA gives a fuller picture than a 1% sample ever could.

BOARDS ARE PAYING ATTENTION. AI IS FORCING CHANGE, BUT IT IS ALSO GIVING LEADERS AN OPPORTUNITY TO GUIDE THAT CHANGE AND REFRAME THE CONVERSATION.

Beyond this, the visibility outside the contact center is far greater. It's not just "our" systems that can be interrogated and aggregated, it's *all* of them, from the CRM through ticketing, even internal communications.

Data alone, however, does not change minds. It must be presented in such a way that it is clearly understood by others.

Packaged well, data gives leaders what they have lacked: evidence, timing, and a clear "so what." It converts "we think" into "we know" to justify ongoing and new investments in the contact center. And it makes inaction harder to defend.



The conversation is happening, that C-level mandate is forcing them. Leaders like yourself have the data to guide the conversations: and with the data we have the soft power to drive real change. Other areas of the business can't refuse the conversation or label the problem anecdotal.

That gives contact center leaders the mandate to drive change, to fix the net, so they can bring the customers along.

AI MAKES IT ECONOMICALLY FEASIBLE

There is so much buzz, hype, and excitement around AI that leadership teams are predisposed to invest in it. Customer service has become a C-suite priority because of the perceived potential with AI.

Ironically, those who are most ardently calling for AI transformation are often the least familiar with the workflows, constraints, and risks of production operations.

This opens the door to failed implementations that wreak havoc on all departments, not just customer service.

Worse still, it alienates customers and the agents who engage with them. It also wastes investment resources, both time and money. And it squanders the opportunity for positive transformation.

Contact centers are extremely complex, mission-critical operations. AI capabilities are new, powerful, and rapidly evolving. But the two elements don't easily mix. Effective deployment requires:

- **A workflow-first view** of how service actually gets done, end-to-end.
- **Ready access to the right data**, governed and reliable.
- **Pragmatic, iterative change**, where you automate what should be automated, assist where judgment matters, and redesign where the system itself is wrong.



THE RIGHT APPROACH IS TO BUILD A COLLABORATIVE SYSTEM WHERE AI ENHANCES THE CONTACT CENTER HUMAN WORKFORCE...

When leaders internalize that reality, the conversation shifts. It becomes acceptable, even necessary, to make broader changes around policy, data quality, and ownership to harvest the ROI that AI can offer.

It's *not* about reducing the contact center workforce. Instead, it is about building a system that handles growth and complexity with less friction, one that frees human talent for the work only humans should do.

The right approach is to build a collaborative system where AI enhances the contact center human workforce so that they can keep pace with rising volumes while changing the underlying mechanics of service for the better.

EMBEDDING CUSTOMERS IN THE WORKFLOW

Contact centers have spent decades optimizing interaction handling. Now you must optimize *workflow orchestration with the customer inside it*.

Customers increasingly arrive already identified and contextualized. They're in an app, logged into a web portal, or conversing with a bot that can pass the customer's state forward. That context is an asset that allows you to move from reactive triage to guided progression.

Here's what embedding the customer in the workflow really means:

- **From tickets to tracks.** Instead of treating each contact as a fresh transaction, recognize it as a segment on a defined track, such as onboarding, billing inquiry, service outage, cancellation risk, and claims fulfillment.

Tracks expose milestones, owners, and dependencies. They allow you to identify what breaks within the system, to cause the interaction in the first place.

- **Co-navigation, not mystery.** People are calmer and more trusting when they can see the steps, status, and ETA.

Surface the work to the customer (what's been done, what's next, and what's needed from them) and let the customer provide their feedback in the process.

It's a conversation that you can mine for insight, so wherever possible, capture their reactions and thoughts. Let them tell you if the process isn't getting them where they need to go. Silence breeds repeat contacts; transparency reduces it.

- **Customer-led triage.** With context, you can ask smarter questions and let customers route themselves safely. "It looks like you updated your address yesterday; are you calling about the new delivery?" You're leveraging what you already know to shrink discovery.
- **Use your UIs.** Historically the only interface we have with a customer is the interaction itself. If they're on the phone, we have to talk them through it. If they're on a webchat, we type.

However, if the customer is authenticated and, in a portal, you can surface information in whatever way makes sense to inform the workflow and the conversation.

- **State that persists.** Whether the customer is in a bot, a portal, or on a call, the workflow state should travel with them. Repetition is the enemy of trust. Persistence is table stakes.
- **Signals that teach the system.** Every pause, backtrack, and upload is a signal. When captured and fed back, these signals reveal friction points and broken policies faster than any post-mortem.

Embedding customers in workflows creates a shared truth. It reduces effort, cuts repeat contacts, and exposes root causes in real time. It also surfaces to the customer all the work being done for them.

When you know where you stand, can see that someone's working to fix our issue, and feel part of the solution, you're just happier about it. Most importantly, it reframes service as progress through a system, not a series of disconnected conversations.

BRINGING IT ALL TOGETHER

The critical cognitive shift that must occur is to move from considering the immediate interaction to understanding and enhancing the workflow behind it.

- **Interactions are transactional;** they're about managing the fallout from the broken process.
- **Workflows are foundational;** they're an understanding of how things really work for the customer.

When you instrument those workflows with data, amplify them with AI, and place the customer inside them, three things happen:

1. **Root causes light up.** You can see where the system breaks and what that break costs.
2. **Change becomes fundable.** Clear evidence plus credible ROI makes investment easier to approve.
3. **Experience compounds.** Transparency and continuity reduce effort for customers and agents, and each cycle makes the next one better.

WHY IT MATTERS FOR YOUR PEOPLE

The frustration of being the front line is real. It is not just about broken processes, taking the hit has a real human cost.



Customer service professionals are wired to help. Giving them a way to fix causes, not only symptoms, improves morale, reduces burnout, and makes the job worth staying in.

When agents see that their notes and tagged calls lead to real change, you get better data, ideas, and retention. It doesn't just help your customers; it helps your teams too.

WHEN AGENTS SEE THAT THEIR NOTES AND TAGGED CALLS LEAD TO REAL CHANGE, YOU GET BETTER DATA, IDEAS, AND RETENTION.

Beyond this, many in the business are predisposed towards eliminating agent positions. "Why can't we just automate that cost center away?" is damaging thinking that must be countered. That requires a clear plan, with leaders articulating why automation for cost reduction only further rips the net.

REPAIRING THE NET

Customer service and AI are now board-level priorities. That opens the conversation about what is preventing the experience you want to deliver.

The data you need is available, and if the leadership is predisposed to believe there's a business case, the technology makes it possible.

Crucially, customers can now be involved in the overall workflow in ways that future-proof the investment. Involving them sets up the constant iteration and enhancement needed to keep pace.

The contact center will always be a safety net: and it will still catch what slips through the system. If you build and run the loop, the net stops tear-

ing. It becomes a signal that makes the whole organization stronger, and it aligns the business towards the value you deliver to customers.



Fail to make the shift, and the contact center remains the punching bag. We in the industry continue paying for everyone else's mistakes on a fraction of the budget.

But make the shift, and the contact center becomes the engine that drives customers on their journeys, and which guides how the organization designs, delivers, and learns. 



Chris Marron is an independent communications-industry analyst and advisor who helps leaders understand the customer service technology market. With over a decade in the field, he has led customer service and communications research for multiple analyst firms. His commentary centres on the intersection of people and technology.

FROM THE SIDELINES

KATHLEEN M. PETERSON



THE "LITTLE BILL" THAT SAYS A LOT.

Who? Has anyone noticed an itty-bitty bill floating around the 119th U.S. Congress? It is named the *Keep Call Centers in America Act of 2025*. Yes, that is really the title. It has appeared with the rarest commodity in Washington—bipartisan support. Whether the bill goes anywhere is anybody's guess. But its very existence says plenty. It says that Congress is noticing. Small as it is, the bill signals that consumers want service that works. They want human access. And they are tired of being ignored.

FRUSTRATED CONSUMERS—LEGAL ATTENTION IS COMING
Consumers have finally had it. Years of ineffective automation, circular IVRs, unfindable phone numbers, and the slow disappearance of human help have pushed people past the breaking point. Complaints have been so loud, persistent, and universal that Congress has taken notice. That alone is remarkable. For years, brands have quietly stripped phone numbers from their websites, buried "Contact Us" behind endless FAQs, or posted a number only to tell customers to email someone who may (or may not) reply in three days.

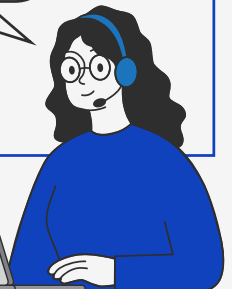
Digital detours frustrate consumers before a call is even made. And if they do get through, they may find themselves trapped in an IVR, yelling "AGENT!" or "REPRESENTATIVE!" at a machine that can't understand context, nuance, or urgency. That universal gesture of exasperation has become so widespread that it is practically a national pastime.

Congress is now responding to frustration that has been brewing for decades. The repeated yelling at a machine isn't just humorous—it is telling. Customers are desperate to reach people who can help and they want the transparency to make that choice.

DONT MISS OUT!

We hope you didn't miss **Kathleen Peterson's** *From the Sidelines* article in our January issue. That's right...Kathleen came out of retirement just for us to discuss the Keep Call Centers in America Act of 2025.

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"LITTLE DROPS OF WATER MAKE THE MIGHTY OCEAN."

--JULIA CARNEY, POET



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HOW CONTACT CENTERS FINALLY FOUND THEIR VOICE

WHY VOICE AI SURPASSES IVRS AND IVAS.

Generative AI voice agents are finally accomplishing what IVRs and intelligent voice agents, or IVAs, set out to achieve in the contact center.

Why do businesses avoid the customer's call? At \$20 per call with a human agent, it's not worth it for them to talk with you.

But if technology could allow voice interactions at a fraction of the cost, businesses could go back to engaging with customers in the channel they preferred. It's only taken over 75 years for contact centers to find the appropriate solution.

THE BIRTH OF CONTACT CENTERS

From their earliest days of contact centers, the goal was to standardize and automate to reduce costs and simplify the operations of customer experience (CX).

Following the introduction of automated call routing systems, customer service hubs, staffed by "operators" sitting in centralized locations, managed customer calls, and processed orders.

But there were challenges. At the top of the list was the expense of hiring, training, and retaining customer service representatives.

WHY DO BUSINESSES AVOID THE CUSTOMER'S CALL? AT \$20 PER CALL WITH A HUMAN AGENT, IT'S NOT WORTH IT FOR THEM TO TALK TO YOU.

Turnover was high, given the lack of advancement and the stressful working environment. More customers expected 24/7 services, an expectation that was often cost prohibitive and difficult to staff, especially for overnight shifts.

Many customer inquiries involved basic, routine questions: checking order status, account balances, seeing if prescriptions were ready, or the locations of stores. But paying human agents to handle these inquiries was inefficient and costly, while customers endured unnecessary wait times.

And, of course, humans are...human. They get sick, take vacations, and aren't always in the best mood.

THE EARLY ERA OF SPEECH RECOGNITION IVR

In the 1970s, early IVR systems were launched, bringing a new tool to automate voice interactions and reduce their handling by humans.

These first phone trees let you "press 1 for sales, press 2 for service," and so on. They didn't need sick days or PTO: and mood swings weren't an issue. Delivery of information could become standardized across the brand.

While initial systems were expensive and difficult to implement, hardware advancements brought down costs and simplified deployment.

These developments led to an explosion of IVR use in the 1990s, especially across financial services, telecommunications, utilities, and the airline and travel industries. If your business wasn't using IVRs, you were behind the eight ball.

However, IVR's limitations soon became apparent. Early systems required customers to listen to long lists of menu options, and there was no guarantee their specific issue would be on that list.

These speech-enabled systems often struggled with accents and background noise, leading to frustration and the infamous "press zero" option to reach a human operator: defeating the purpose of the IVR entirely.

For businesses, the worst part was that instead of solving problems, these systems became emblematic of *bad* customer service, eroding trust in the brand.

BUT WHILE IVAS WERE HERALDED AS A HUGE STEP FORWARD, FROM A CUSTOMER PERSPECTIVE THEY WERE STILL PRETTY LACKLUSTER.

NLP AND IVAS

Advances in natural language processing (NLP) enabled major steps forward. NLP was an early method for understanding and processing human language and human intents. It allowed IVRs to ask more open-ended questions, such as "How can I help you?"

With NLP, IVRs became IVAs. The customer was now able to engage with the system more verbally instead of incessantly pressing buttons or screaming the ask to speak to a human. NLP enabled intent detection, which is the ability for the model to identify what the customer was asking about.

But while IVAs were heralded as a huge step forward, from a customer perspective they were still pretty lackluster.

Issues with the system misunderstanding the customer's request were still common. The IVA would take what was said by the customer and match it to the closest result based on their interruption. It didn't seem to matter if the IVA's response was irrelevant and had nothing to do with the request.

So, if you said, "I'm really struggling with opening the window," the IVA might respond, "Great. I'll help you find a new window." It didn't understand the nuance of what you were saying and tried to match its settings to the closest thing it knew.

Customers realized the IVA couldn't help with complex or nonstandard requests, and often immediately resorted to mashing "0" or saying "representative," to get out of them. And it was actually hugely time consuming for companies to build and manage these systems as they were so rigid.

THE RISE OF AI VOICE AGENTS

Through it all, customers still seek out that voice engagement. Up to 70% of customer interactions still happen by phone despite companies' best efforts to hide their customer service numbers.

Large language models (LLMs) enable the understanding and generation of language as well as reasoning. This massive technological advance is powering a new generation of automation: voice AI agents.

Whereas traditional NLP-based IVAs excelled at structured, rule-based customer interactions, LLMs enable more natural, nuanced, and contextually fluent engagement.



WHAT IS AI "TEMPERATURE CONTROL"?

When you come across the term "temperature control" in discussing AI it doesn't refer to that in the user's office, the conference room, or the data center.

Instead, temperature control refers to tuning how deterministic or creative an AI model's responses are.

Lower temperatures make the model more predictable, consistent, and on-brand, while higher temperatures allow more variation but increase the risk of going off-script.

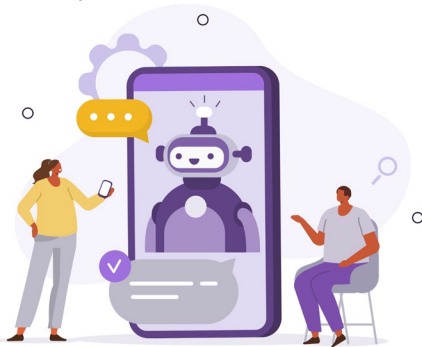
BOX



Internally, we find that despite it being obvious that they are speaking to an AI agent, voice AI agents boast containment rates above 97%, dramatically better than the 20%–40% containment seen with IVAs. That puts voice AI agents' containment rates on par with top-performing human agents.

The most exciting part is that in the last 12-18 months, AI agents have started to perform better than human agents.

Why? Human agents must jump from call to call, with little downtime. They aren't always available and even when they are given customer information, they aren't able to instantly process it all. They are humans, after all.



AI agents, by contrast, are always available, and can quickly ingest every past conversation, analyze it in real time, and deliver deeply personalized conversations.

Customers can get the experience they want and in the channel they prefer (voice, most often), with better outcomes than a human could provide.

Yes, early LLMs have known weaknesses, but these have been acknowledged and are being addressed, like accepting uncertainty to avoid wrong answers (i.e., hallucinations).

Also, leading suppliers have been investing heavily in guardrails, temperature control (see **BOX**), continuous supervision, post-call QA, and more on their LLM-using platforms. This ensures that brands are comfortable using AI agents to handle customer interactions.

We have done more than 350 million calls with a CSAT over 85%, indicating customers are happily taking advantage of brands' investments in this area.

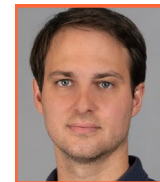
Voice AI agents are finally fulfilling the promise of a low cost, high-quality voice interaction that will eliminate the need for contact centers to staff hu-

mans to do Tier 1 customer interactions and open up budget that will enable companies to massively increase investment in the CX.

VOICE AI AGENTS ARE FINALLY FULFILLING THE PROMISE OF A LOW COST, HIGH-QUALITY VOICE INTERACTION...

A hybrid approach enables organizations to efficiently and cost-effectively scale support and provide customers with quality experiences, while also elevating the role of human agents.

The real winner? The customer.📞



During his time overseeing customer experience teams, Alex Levin encountered the limitations of traditional contact center software and human support operations. Drawing on his Harvard academic foundation in human psychology and his firsthand experience with CX challenges, Alex founded Regal to facilitate a future where voice AI Agents transform business-consumer interactions.

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ASCENDING BEYOND COPILOTS

VIBE SERVICE TAKES CX TO A HIGHER LEVEL.

I still remember a conversation I had with a smart home provider. Their frontline contact center agents were expected to support more than 600 different devices and master tens of thousands of troubleshooting scenarios.

Imagine being that agent. One minute you're asked about a security camera, the next about a thermostat or a smart lock.

Something as simple as a battery replacement could easily go wrong with these devices. And when the wrong part was shipped, it created massive operational losses for the provider. Not to mention the frustration it caused their customers.

The smart home provider knew that simply adding more scripts, knowledge base articles, or training wasn't going to cut it.

What they needed was a different approach: technology that could actually stand behind the agent's shoulder and help in real time.

Not just software that *reads and types*, but **AI that can see, hear, read, and guide** - identifying the device, diagnosing the issue - and pulling the right resolution without forcing the agent to juggle 10 different tabs.

That's when their transformation truly began...



...MOST COPILOT DEPLOYMENTS FALL SHORT OF THEIR PROMISE. THESE TOOLS HELP, BUT THEY ONLY GO SO FAR.



COPILOTS: PROGRESS, BUT NOT ENOUGH

We've all seen the rise of AI copilots in the contact center. They summarize calls, suggest next steps, and provide insights. They're useful, no doubt.

But as of late 2024, only 14% of customer interactions were fully resolved through self-service. In other words, the majority of customers still end up needing a human.

That means agents are dealing with more complex, emotionally charged issues than ever. In a reality where self-service has clear limits, agent assist *must* be at the center of companies' AI strategies, driving both cost reductions and better customer experiences (CXs).

And yet most copilot deployments fall short of their promise. These tools help, but they only go so far. They often lack context, they don't integrate well, and without vision, they can't really understand what the customer is experiencing. A copilot that only works with text or voice might keep the plane steady, but it still leaves the pilot flying blind.

WHY VISION MATTERS

Customers don't just want someone to listen. They want someone to *see* what they see.

So many service issues are visual: a flashing router light, a miswired cable, an error message on a screen. Trying to troubleshoot those through words alone is like asking a mechanic to fix your car over the phone without ever looking under the hood.

This is where multimodal AI makes the difference. By combining vision, voice, and text with real-time guidance, contact center agents suddenly get the missing piece. They can instantly recognize the devices, interpret the problems, and walk the customers through the solutions with confidence.

The numbers prove it. This smart home provider reported a 50-point jump in their Net Promoter Score (NPS), an 80% boost in CSAT, a 75% drop in truck rolls, and more than \$330 million in estimated annual ROI. Those aren't incremental gains but a transformation.

FROM COPILOT TO VIBE SERVICE

This is where we move beyond copilots to what I call **Vibe Service**, which blends their core AI assist technology with multimodal AI.

Copilots are transactional. They help you do the same job a little faster. Vibe service is something else entirely. It's about upskilling the human agent, in real time. It's about giving them superpowers they never had before.

Suddenly a Tier-1 agent performs like a Tier-2 agent, or even like a remote technician. A new hire can handle complex issues without months of training. Contact center agents don't just *read* instructions, they can see, diagnose, and resolve problems.

We've seen this play out in other fields. Vibe coding gives developers new powers and vibe selling lets sales teams do things they never thought possible.

In today's agentic reality, AI isn't just automating work, it's augmenting people. And in the contact center, that means service that feels more intuitive, more capable, and more human at scale.

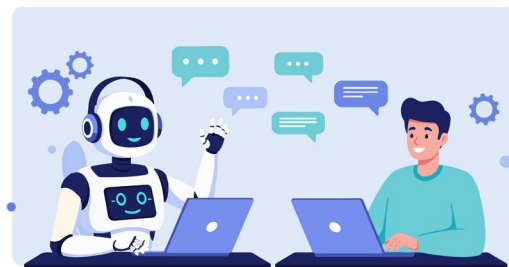
VIBE SERVICE IS ABOUT MAKING SERVICE NOT JUST FASTER, BUT SMARTER, MORE HUMAN, AND FAR MORE EMPOWERING.

THE HUMAN IMPACT

Contact center work is tough. From what we've heard from our clients and gathered from our own research, agents are often stressed, at risk of burning out. Not surprisingly many of them think of leaving less than a year after being hired: and some actually do.

When agents are asked to solve complex problems without the right tools, it quickly becomes overwhelming.

• UPSKILLING



Vibe services change that. By taking away the guesswork, it gives agents back their confidence. They feel like experts instead of script readers. They are no longer chasing answers across endless tabs. Instead, they're guiding customers with precision and empathy.

The metrics from our early adopters are impressive: lower handle times, higher first contact resolution, fewer returns, dispatches, and stronger loyalty. But the *real* story is the impact on people. The result is lower attrition, higher engagement, and a renewed sense of pride in the agent role.

A CALL TO THE INDUSTRY

Every era of customer service has had its breakthroughs. IVR made routing easier. Self-service gave customers more control. Copilots streamlined workflows.

Now it's time for the next leap. Vibe service is about making service not just faster, but smarter, more human, and far more empowering. It's about turning Tier-1 service reps into virtual technicians and ensuring that every customer feels truly seen.

The lesson is simple. When you give agents vision, alongside voice and text, and equip them with the right AI tools, you give them the ability to solve problems that once drained budgets and burned-out staff.

This is where multimodal AI powers the Vibe Service transformation, acting as the engine that unlocks these new capabilities.

Copilots helped us fly straighter. Vibe service makes it more human. Agents are supercharged, customers feel understood, and service becomes a genuine differentiator. **📍**



Eitan Cohen is CEO and co-founder of TechSee, the leading agentic AI-powered platform harnessing vision to transform customer service. He is passionate about solutions-driven technology that reduces churn, improves the customer experience, and lowers operating costs.

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