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DMG
CONSULTING LLC

Workforce Management in the Age of AI: 2026 CX Market Report

↓

DOWNLOAD THE REPORT



2026

New Research!

Complimentary WFM Market Report for the Contact Center Pipeline Community

Courtesy:
DMG Consulting

DMG Consulting just released the *Workforce Management in the Age of AI: 2026 CX Market Report*, an independent analysis of the workforce management (WFM) market as AI reshapes contact centers. The report provides a clear, forward looking assessment of emerging capabilities, market trends, vendor offerings, and the forces redefining modern CX operations.

Workforce Management in the Age of AI: 2026 CX Market Report

Report by DMG Consulting

For the first time, DMG Consulting is making a full market report available, at no cost to support organizations evaluating WFM platforms, modernizing their operations, or planning next generation workforce strategies.

Contact Center Pipeline readers, download your complimentary copy of the report: *Workforce Management in the Age of AI: 2026 CX Market*.

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THOUGHT YOU SHOULD KNOW

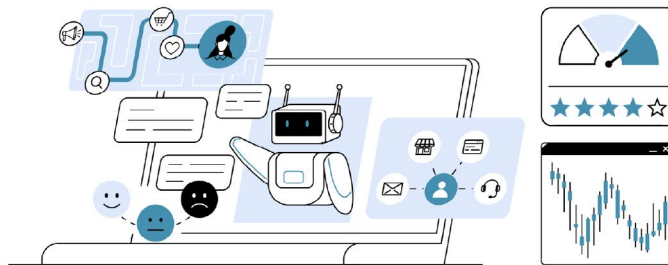
A MONTHLY DOSE OF FACTS & FIGURES FROM INSIDE THE ISSUE



1%-15%

Contact rates—the percentage of outgoing calls that lead to a live conversation—can range anywhere from less than 1% to roughly 15%.

SOURCE
OUTBOUND:
WHY CX INCREASINGLY
REQUIRES OUTBOUND
By Daniel Foppen
#OUTBOUND



75.7%

75.7% of organizations prioritize AI and automation investments in the next 12 months. But ... 48.6% simultaneously struggle with agentic AI implementation, and 64.9% face limited budgets and resources.

SOURCE
CUSTOMER
EXPERIENCE:
THE CX EXECUTION
CRISIS
By Denys Dubner
#CUSTOMEREXPERIENCE

64%

The survey found that 64% of respondents feel frustrated during digital self-service experiences, and 39% feel exhausted afterward.

SOURCE
CUSTOMER EFFORT:
SHOULD YOUR
CUSTOMERS WORK FOR
YOU?
By Bryan Cheung
#CUSTOMEREFFORT

82%

82% of respondents feel they are performing tasks that employees once handled.

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CUSTOMER EFFORT:
SHOULD YOUR
CUSTOMERS WORK FOR
YOU?
By Bryan Cheung
#CUSTOMEREFFORT

18.9%

Only 18.9% of CS and CX leaders feel highly supported by their organizations, while 56.8% struggle to secure resources.

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By Denys Dubner
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FROM THE PIPELINE



LINDA HARDEN

PUBLISHER, CONTACT CENTER PIPELINE

Customer experience has become the defining battleground for many businesses. Organizations are racing to create faster, smarter, and more personalized interactions. The question facing us today is not whether to innovate, but how to find the right balance.

As multimodal AI moves towards practical application, businesses now have the ability to understand customers across text, voice, and video in ways previously unimaginable. Once again, we are faced with how to integrate these technologies into current processes for effective results.

We continue to discuss how best to attract and retain talent, so don't miss Part 3 of April's article on how to do just that.

A common thread with our articles this month is to focus on how organizations can integrate innovation without losing sight of what matters most — people. The most successful companies are not choosing between automation and human connection. They are looking for the balance and how to use new technologies to strengthen our customer experiences and drive business forward.

I hope this issue provides inspiration for the months ahead.

Linda Harden

Linda Harden
Publisher
Contact Center Pipeline

LATIN AMERICA CONTACT CENTERS



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HOW BEST TO SERVE LATAM CUSTOMERS WHY A MARKET-BY-MARKET STRATEGY IS ESSENTIAL.

BY PABLO ROSSEL ESTAY

NEAR/OFFSHORING



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FCC NPRMs TARGET NEAR/OFFSHORE CALL CENTERS

AGENCY, LAWMAKERS ARE ALSO AIMING AT
OUTBOUND DIALING.

BY MELODY MOREHOUSE

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VIVE LA CONTACT CENTRE DIFFERENCE, EH?

HOW BEST TO SERVE THE UNIQUE CANADIAN CUSTOMERS.

Canada has long had a strong and dynamic customer contact industry, employing nearly 182,000 people, and for many good reasons.

The country has an advanced and prosperous economy (CAD\$3.1 trillion) a generally affluent, well-educated, technology-savvy population, and a relatively stable political system.

But Canada and its peoples (I am also a Canadian) are arguably not well understood by those in other countries. That is largely because the nation is overshadowed by the U.S., particularly in entertainment and media, and, to an extent, by its lingering ties to the U.K.

Even so, Canadians have particular characteristics, shaped by Canada's climate, geography, history, and immigration, that pose both opportunities and challenges that need to be considered when seeking to deliver excellent customer experiences (CXs).

As examples, Canada has distinct holidays and telemarketing legislation (see **BOXES** on these two topics). It also has unique privacy and other laws (federal and provincial) that impact contact centers (see the article "The U.S. – Canada Compliance Gap" in this issue).

To learn more about Canada and contact centers, I had a great conversation recently with two leading Canadian industry experts and practitioners, **Mike Aoki**, President, Reflective Keynotes Inc. and **Afshan Kinder**, CEO, elevate2Great.

I hope you find it enlightening. I certainly did.



Q WHAT ARE THE FACTORS THAT MAKE CANADIANS AS A PEOPLE OR PEOPLES UNIQUE IN THE WORLD? AND DO THESE ATTRIBUTES AFFECT PROVIDING EXCELLENT CXS TO THEM?

MIKE AOKI (MA)



One of the immediate, most noticeable, and classic things you hear from Canadians is "sorry." Someone bumps into you at the grocery store, but you say, "I'm sorry," even though they're the ones who bumped into you.

In Canada, "sorry" is used as a pleasantry rather than an admission of remorse. But in some U.S. jurisdictions, saying "sorry" can be viewed by courts as an admission of guilt. So, agents who serve U.S. customers need to avoid saying "I'm sorry" because of that legal issue.

Lawsuit amounts in Canada are capped monetarily. So even if you do win an action here, you're not going to get that much, whereas in the U.S. you could be awarded damages from a massive multimillion-dollar class action lawsuit.

This leads to another characteristic of Canadians that, like Britons and Europeans, we're looking to get a problem solved and are not necessarily looking to sue as easily or as readily.

So, it draws some different customer behaviors and different agent responses because of that. Conversations with Canadian customers tend to focus more on fixing their problems and with them being seen as valued. Meanwhile, ideal agent behavior focuses on fixing the problems AND fixing the relationships.

AFSHAN KINDER (AK)



What makes Canadians unique is a combination of our attitudes about our cultural mix, communication style, and the values we share across our country.

Our original heritage is a blend of British and French traditions, Indigenous cultures, and, through the centuries, a multicultural population.

Like the U.S., Canada was largely settled by the British, but we evolved in a different cultural direction. While both countries share British roots, Canada retained more British traditions over time, partly because our political development was more gradual and less shaped by conflict.

We also have a strong French heritage that played and which continues to play a major role in our national identity.

Rather than describing ourselves as a "melting pot," Canadians often use the term "mosaic," reflecting a cultural identity where diversity is preserved and celebrated. This influences how we think, how we communicate, and how we deliver an outstanding CX.

You can still see these influences today, even in small details like our spelling. For example, we write centre instead of the American spelling center or flavour, neighbour, honour, colour, etc.

I don't mean to generalize, but one could say that Canadians are perceived as more polite and tactful compared to an American communication style, which is often direct and to the point.

When you compare us with U.S. customers, there is a difference. Again, without generalizing, Americans tend to want things fast. That is, fast answers, fast resolution, and fast decisions. Canadians, on the other hand, put more weight on clarity and fairness.

I remember reading some consumer research from Deloitte and McKinsey that really underscored this point. Their research indicated that Canadians are more deliberate and value-oriented, and we respond better when the interaction feels respectful and the solution is thoughtfully explained.

So those expectations naturally carry over into the way Canadians want their CX delivered, which is with clear information, a respectful tone, patience, and a sense that we're not being rushed or pushed into a decision.

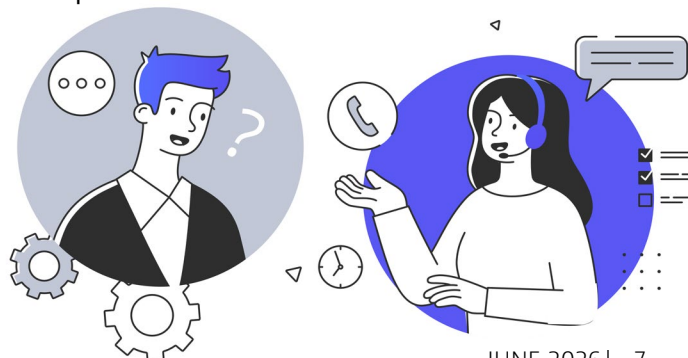
"...WE RESPOND BETTER WHEN THE INTERACTION FEELS RESPECTFUL AND THE SOLUTION IS THOUGHTFULLY EXPLAINED."

-- AFSHAN KINDER

Q WHAT ARE THE KEY, CANADA-SPECIFIC-AND-SHAPED CHALLENGES FACED BY CONTACT CENTERS?

MA: Because Canada has a smaller population and overall talent pool, employee engagement and employee retention are key challenges for Canadian contact centers.

We don't want or can't afford to bleed off 30%, 50%, and 100% of the agent workforce a year. It's just too expensive to go and lose that kind of talent. It is not uncommon in smaller cities to have agents who have worked for multiple companies in the past.



DIFFERENCES WITHIN CANADA, BETWEEN CANADIANS

Canada is not only a distinct country and peoples that require knowing about and paying attention to when serving them, but there are cultural, language, and regional differences within its borders that can (and will) affect these strategies.

So, we asked Mike Aoki and Afshan Kinder about them. Here are their insights.

MIKE AOKI:

I would like to point out especially to our American audiences that 90% of Canada's population lives within about 100 miles (yes, 160 kilometres) of the U.S. border. It is spread out mostly east to west and concentrated in a handful of major urban areas located in the southern part of the country.

So, some of the regional differences end up being more east-west, than north-south, within Canada. Here are some examples:

- Newfoundland and Labrador, which has a distinct identity and dialect. They were a British colony, and briefly a self-governing dominion until 1949, when it joined Canada. The residents value relationships and want customer service that values that relationship.
- In Quebec, French is the only official language, and uses French common law, rather than the British common law which forms the basis of both English-Canadian and U.S. law.

Most large Canadian contact centers value staff who can speak both English and French. Also, the solutions offered to Quebec-based customers must conform to Quebec laws, which may differ from those in the other provinces and territories.
- People in Toronto tend to be very fast-talking and impatient, wanting answers quickly.
- In contrast, being on the West Coast, Vancouverites are more laid back and speak slower, like Los Angeles residents which they share with the film industry i.e., "Hollywood North."
- Alberta, Saskatchewan, and Manitoba, which are Canada's central provinces, prefer straightforward customer service and are suspicious of fast-talking reps.

There are also differences between urban and rural areas. Rural residents may have slower rates of speech than urban residents and want more time spent during the conversations on pleasantries and small talk; I can attest to that as I come from a rural community in southwestern Ontario.

So, when I'm training agents, I always mention to listen to the customer's rate of speech and speed up or slow down accordingly. Also, adjust your level of formality from "strictly business" to "professional but customer-relationship-focused" depending upon the clues the customer provides.

In Canada we're also trying to cover many time zones in the same continent. They range from the Newfoundland Time Zone, which is -3.5 Universal Standard Time (UST) to the Pacific Time Zone, which is -8 UST, which affects agent shift scheduling and coverage (British Columbia, which is on Pacific Time, recently made daylight savings time permanent).

Also, if you say bilingual to an American, they're thinking English and Spanish. But in Canada it's English and French.

Canada also tends to be more multilingual. It's not uncommon for Canadian contact centers to officially offer English and French, but have another dozen or two dozen languages that they could accommodate. At least somebody there will speak that language.

AFSHAN KINDER:

One of the biggest misconceptions, especially from outside the country, is that Canada is one big market with one personality. It's not. We're a country of 10 provinces and three territories, and each has its own identity, priorities, and expectations.

Take French Canadian customers as an example. They're not limited to just Quebec. We have strong francophone communities in Eastern Canada, Manitoba, and Saskatchewan. They tend to value warmth and relationship building, and they respond well to a more conversational tone.

Our Indigenous communities bring another dimension that needs to be understood. Because of the historical trauma they've experienced, trust and respect are incredibly important.

Many Indigenous communities are also in remote areas where connectivity isn't always reliable, and that affects their access to digital channels, which is a disadvantage.

This is being recognized and there was promising news that an Indigenous-led consortium in the Yukon is working to secure the funding needed to become the region's primary telecommunications provider. If successful, it would mark the creation of the first Indigenous-owned telco in Canada, which would be an incredible milestone.

We're also a highly multicultural country. Immigration standards are high, so newcomers bring strong education and a range of cultural norms.

That shows up in how the customer experience (CX) is delivered. Some cultures are indirect in stating their needs; others prefer more formality; some are uncomfortable with conflict.

So yes, Canada's diversity, regionally and culturally, shapes customer expectations. If you understand that, you can design much better Canadian CXs.



"...CANADA'S DIVERSITY, REGIONALLY AND CULTURALLY, SHAPES CUSTOMER EXPECTATIONS."

-- AFSHAN KINDER

Also, Canada's infamous winter weather poses a workforce management (WFM) challenge! WFM teams need to keep an eye on weather reports because a snow or ice storm or severe flooding can mean half your agents cannot get into work, and the other half cannot get home!

Hybrid and work-from-home (WFH), including emergency WFH models, can help ease that problem. But as these weather events also affect homes, contact centers need to have agents in other climatic and geographic areas to provide business continuity.

Meanwhile, in Toronto (which, I understand from Wikipedia, ranks just behind Mexico City, New York City, and Los Angeles, as the fourth largest metropolitan area in North America), traffic congestion and the cost of living downtown mean WFH or hybrid are very popular options for contact centers.

CANADIAN HOLIDAYS

Canada has several federal and provincial/territorial statutory or public holidays. These may impact contact center staffing, such as scheduling agents, and costs, such as overtime pay for when employees work on those days.

Some of the following holidays are unique/not common and may be unfamiliar to those outside of Canada:

- Family Day
- Victoria Day
- Fete Nationale/Saint-Jean-Baptiste Day (legal holiday in Quebec)
- Canada Day (also observed as Memorial Day in Newfoundland and Labrador)
- Civic Holiday (not observed in Quebec)
- National Day for Truth and Reconciliation
- Thanksgiving (second Monday of October; celebrates the fall harvest)
- Boxing Day (day after Christmas)

Note: both Family Day and Civic Holiday have different names depending on the province e.g., Family Day is referred to as Louis Riel Day in Manitoba, while Civic Holiday is known (naturally enough) as B.C. Day in British Columbia.

Note also that Canadians may take the time out to honor those fallen in war on Remembrance Day (Nov.11); it is a statutory holiday federally and in several provinces. Many people wear fabricated red poppies or poppy pins out of respect.

The poem, "In Flanders Fields" was written by a Canadian, Lt. Col. Dr. John McCrae, who served as a physician in World War I and died before it ended.

There is also an unofficial "holiday" and that is spring break, which is in mid-to-late March but also in April depending on the province.

This is when the elementary, junior, and high schools, and the CEGEPS (in Quebec), are closed. It is when many families have their vacations at the end of the country's typically arduous winters.

"...CANADA'S INFAMOUS WINTER WEATHER POSES A WORKFORCE MANAGEMENT (WFM) CHALLENGE!"

-- MIKE AOKI

AK: A few come to mind and they're very tied to who we are as a country. When the pandemic hit, we moved incredibly fast to remote work.

Now many centers have transitioned to become hybrid, while others want their teams to be on-site. It may not be a unique challenge to Canada, but variances in productivity is an issue that is top of mind here.

What may be unique is that a number of Canadian businesses are taking advantage of the access they have to talent across our nation versus confining themselves to a geographic footprint.

We no longer have to go just to Quebec to find bilingual team members. We have countrywide access to bilingual agents, technical specialists, and people living in isolated areas where access is by ferry or small aircraft. *For Canadian businesses, expanding that recruitment reach has been a major win.*

When it comes to modernizing operations, large Canadian organizations such as banks, insurers, and even some telecom providers tend to adopt new technologies and AI more cautiously than their U.S. counterparts.

So, modernization is happening, but it's slower because the foundational upgrades required are both complex and costly.

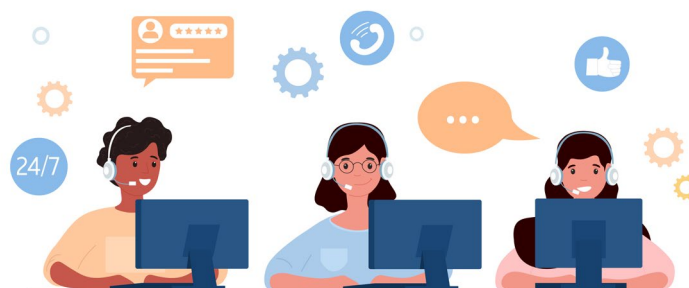
Before companies can fully leverage AI and automation, they need to rebuild or modernize their core platforms. That initial phase doesn't generate ROI on its own; it simply lays the groundwork for the capabilities that will create value later.

Canada's stringent regulatory environment also plays a role. When you layer rigorous compliance requirements onto technology roadmaps, timelines naturally stretch out.

Even Canadian organizations that are further along in their modernization, ROI isn't guaranteed. One of my clients implemented Agent Assist and realized little benefit.

Here's why. The client hadn't asked the most important question, namely "What problem are we solving?" They also had a very tenured, highly knowledgeable team that often knew the answers better than the AI bot.

This lesson there is real. And it applies to all contact centres, in Canada and elsewhere. If employees don't see or trust the value in a tool, adoption stays low and ROI becomes negligible.



COMPLYING WITH CANADA'S TELEMARKETING LAWS

BY FLORENTINA G. STANCU-SOARE

BOX

Canada has a set of distinct telemarketing laws and regulations. If you are calling Canadian consumers or businesses, the Canadian rules apply, regardless of where your team is based. Canadian companies may be held liable for violations committed by their agents even if they are offshore.

The Canadian Radio-television and Telecommunications Commission (CRTC) enforces the federal telemarketing rules through the Unsolicited Telecommunications Rules.

Canada's federal National Do Not Call List (DNCL) is a registry where consumers register their phone numbers to opt out of telemarketing calls.

Here are the key provisions of Canada's telemarketing rules.

COMPLIANCE REQUIREMENTS

Contact centers must build compliance into their operations. Before launching any campaign, the fundamentals must be in place:

- Subscribe to the National DNCL.
- Scrub calling lists against the registry every 31 days at most.
- Verify any exemptions.
- Maintain records for three years.

During every call, agents must:

- Display valid caller ID.
- Identify themselves, company name, and purpose of call.
- Log all do not call (DNC) requests.

There are new call traceback capabilities, which mean that carriers must be able to identify and trace the origin of suspicious or fraudulent calls across networks. This should help address practices like local number spoofing as it becomes more easily detectable.

CALLING HOURS

The permitted calling hours are as follows based on the recipient's local time, not the caller's:

- Weekdays: 9:00 AM – 9:30 PM
- Weekends: 10:00 AM – 6:00 PM

It's important to always check local holiday calendars as they vary by province and territory. Calling on statutory holidays is prohibited in several jurisdictions, including (but not limited to) Ontario, Nova Scotia, Alberta, and British Columbia.

AUTOMATED DIALING DEVICES (ADADs)

If using auto-dialers, which are systems that automatically dial phone numbers and deliver pre-recorded messages, the ADAD rules apply.

Key requirements include:

- Mandatory express consent to use an ADAD.
- A live agent must be available to handle the call when a consumer engages.
- Inclusion of a recorded message that clearly identifies the company and provides a contact number.

Before launching a campaign, verify that you meet the ADAD requirements.

EXEMPTIONS

Certain relationships and consent types create exemptions to the DNCL requirements, but they come with strict conditions. Exemptions include existing business relationships (recent purchases or inquiries) and business-to-business calls.

Even with these exemptions, if a consumer asks to be added to an internal DNC list, that request must be honored within 14 days, and records kept for three years. No exceptions.

PENALTIES

Violations carry administrative monetary penalties of up to \$1,500 per violation for individuals and up to \$15,000 per violation for businesses.

In 2024-2025, the CRTC issued 154 warning letters, five citations, and 25 Notices of Violations (NoVs).

Here are common compliance mistakes:

- Calling numbers that are on the National DNCL.
- Using stale DNCL data (older than 31 days).
- Ignoring internal DNC requests.
- Not providing proper identification during calls.
- Failing to display valid caller ID.
- Calling outside permitted hours.

--Florentina G. Stancu-Soare, Director, Public and Regulatory Affairs, Canadian Marketing Association (CMA).



**CANADIAN COMPANIES
MAY BE HELD LIABLE...
EVEN IF THEY ARE
OFFSHORE.**

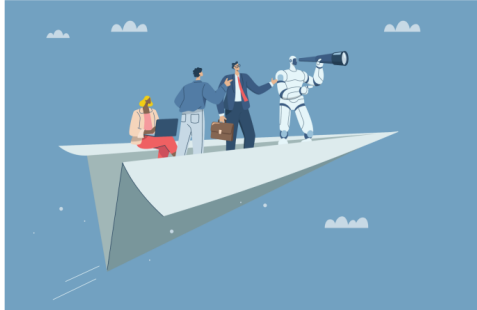
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BY BRENDAN READ

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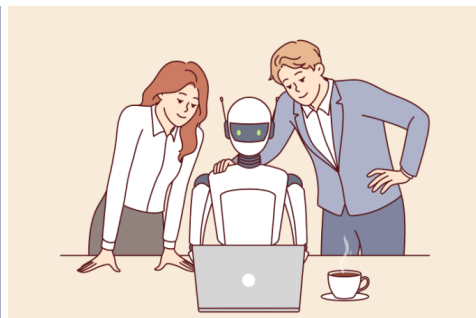
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Is AI Contact Center-Ready?

Q&A WITH VIGNESHWARAN
JAGADEESAN PUGAZHENTHI

AI has been dominating the contact center conversation (as seen by the articles in our publication): and for good reason. The technology's integration of vast data processing power with human-like learning, reasoning, and decision-making abilities, has given it considerable value.

<https://bit.ly/49mkwVf>



SMART INSIGHTS AND PRACTICAL ADVICE FOR THE CONTACT CENTER

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HOW, WHERE TO SERVE CANADIANS

Canada has a strong, culturally/linguistically diverse domestic market that has long required advanced contact centers with highly skilled agents to meet the needs. We reached out to Dennis J. Donovan, principal at Wadley Donovan Gutshaw Consulting (WDGC), to find out how and where best to locate contact center operations there.

STRATEGY

A hybrid workplace model would generally be the best for recruiting/retaining workers in Canada, Dennis points out. It is often more favorable than full-time on-premise due to flexibility for the customer service agents.

"Flexibility allows for greater work/family balance," says Dennis. "In turn, this enhances agent recruitment and retention."

In a hybrid workplace model, customer service agents would be in the office three to four days a week and work at home one to two days a week. Ideally the agents should reside within 30 minutes of the physical office (for ease of commuting).

A more national remote workplace model would *not* be among Dennis' recommended staffing strategies in Canada. Here's why:

- Declining employee engagement.
- Erosion of company culture.
- Reduced collaboration/spontaneous support.
- Challenges for successful team building.
- Performance monitoring/management.
- Security/compliance.

A fully remote strategy *could* work if these agents are in the same metro areas as their companies' offices with mandatory on-site meetings at least once a quarter, i.e., "local remote."

"If a company believes that the benefits of at least partial in-office are not critical then a local remote workplace model might be acceptable," says Dennis.

DENNIS DONOVAN



COMMUNITY TYPES

The location strategies pertaining to U.S. contact center locations also generally apply in Canada (see [April Feature](#)). In the Tier 1 metros, Dennis advises choosing suburban submarkets that are proximate to where targeted skill sets reside. These submarkets should be characterized by:

- Extensive labor pools (direct customer service experience in a specific industry, pools of workers with previous customer interfacing experience, and presence of underemployed).
- Available office space that confers an HR advantage for recruiting/retaining agents (e.g., access, internal work environment, amenities).
- Favorable labor/demographic profiles within the primary commute shed (e.g., 30 minutes) from candidate office sites.

In Canada, there are no formal metro tiers as there are in the U.S. and, reflecting the country's smaller population, WDGC's definition is as follows, with examples (**see FIGURE 1**):

"Of course, in Canada, multilingual (English and French) is important," says Dennis. "Occasionally trilingual (English, French, and Spanish) can become a criterion."

GOING SMALL-MIDSIZED?

Contact centers should give serious consideration to locating in small-to-midsize (Tiers 5, 6) metros in Canada.

"In these metros there is less intensive competitive labor demand, ample supply of qualified skills, moderate turnover levels, lower operating costs especially labor, and minimal risk of future cost escalation (especially labor)," says Dennis.

CANADIAN METRO TIERS

Source: Wadley Donovan Gutshaw Consulting

TIER	POPULATION THRESHOLD	SAMPLE METROS
One	2 million +	Montreal, Toronto, Vancouver
Two	1.0-1.9 million	Calgary, Edmonton, Ottawa
Three	500,000-999,999	Hamilton, London, Kitchener/Cambridge/Waterloo, Quebec City, Winnipeg
Four	200,000-499,999	Barrie, Halifax, Kelowna, Oshawa, Regina, Saskatoon, Sherbrooke, St. Catherines, St. John's, Victoria, Windsor
Five	100,000-299,999	Abbotsford/Mission, Drummondville, Fredericton, Guelph, Kamloops, Kingston, Moncton, Red Deer, Saint John, Sudbury
Six	50,000-99,999	Brandon, Cape Breton, Charlottetown, Grand Prairie, Nanaimo, Prince George, Sarnia, Victoriaville

FIGURE 1

"CANADA'S SMALLER POPULATION MEANS A SMALLER TALENT POOL...THE COST OF REPLACING AN AGENT, AND THE LOST PRODUCTIVITY FROM THE RAMP-UP CURVE OF A NEW AGENT, ARE HIGH."

-- MIKE AOKI

Q WHAT ARE YOUR RECOMMENDATIONS TO CANADIAN CONTACT CENTER LEADERS, AND TO CANADIAN CUSTOMER-SERVING COMPANIES BASED OUTSIDE OF CANADA IN MEETING THE OPPORTUNITIES AND ALSO THE CHALLENGES OF SERVING CANADIANS?

MA: Canada's smaller population means a smaller talent pool. That scarcity, plus a higher pay scale for unionized agents in the financial services and telecom industries, means the cost of replacing an agent, and the lost productivity from the ramp-up curve of a new agent, are high.

So, focus on employee engagement. Reduce agents' stress levels by training them on how to handle upset customers. Support them with helpful coaching. Use AI agent assist tools to help streamline their jobs and remove tedious work. This way they can focus on the customers.

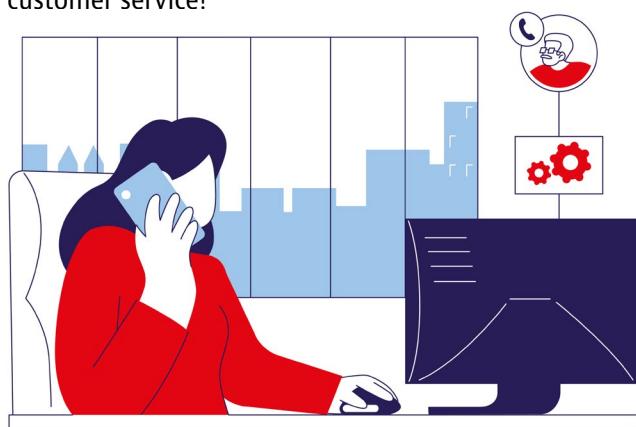
Finally, treat the people in your contact center well because they are the ones interacting with your customers and hopefully, making a great impression.

And when serving Canadians, be attuned to the fact that we tend to be indirect when we are annoyed or disagree.

Phrases such as "You may be right about that" or "We have to agree to disagree on that one" may sound friendly, but they can also be passive-aggressive ways for Canadians to express strong disagreement.

That can also show on customer satisfaction scores (CSAT) or NPS scores where Canadians chose the "mushy middle" of giving a 6 or 7 score where an American would give a 0 or 1.

So, take any negative feedback and double the intensity to get a true read on how upset a Canadian is when they contact customer service!



AK: My first recommendation is to treat Quebec as its own market. The cultural identity, the language laws, the regulatory environment are all different, and they require a tailored approach. Trying to treat Quebec like every other region simply doesn't work.

Beyond that, understand the regional differences across the country. Toronto is not Saskatchewan, and Alberta is not Atlantic Canada. Each region has different nuances and expects different things from service interactions.

It's also essential to recognize Canada's multicultural reality. We're a mosaic. That means hiring teams that reflect the customers you serve.

This is not just in English and French, but in other languages that matter to your market. And it means training agents on cultural communication styles, because not everyone expresses dissatisfaction or urgency the same way.

"...YOU HAVE TO UNDERSTAND HOW CANADIANS COMMUNICATE. WE TEND TO BE POLITE, INDIRECT, AND LESS CONFRONTATIONAL."

-- AFSHAN KINDER

And lastly, you have to understand how Canadians communicate. We tend to be polite, indirect, and less confrontational. When Canadians are upset, we often sound neutral. Agents need to listen for the subtle cues to ensure that excellent service is delivered.

Whether you're operating inside Canada or serving Canadians from somewhere else, your strategy should reflect that Canadians are diverse, regionally unique, culturally layered, and communication sensitive. When you build around that, you deliver an experience that feels genuinely Canadian. 



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.



ILLUSTRATION PROVIDED BY ADOBE STOCK

AVERAGE HANDLE TIME VS. HUMAN TIME

FINDING THE RIGHT BALANCE IN THE CX AGE.

In today's call and contact centers, agents are caught in the middle of a quiet - but constant - tug-of-war.

Leadership wants faster calls, tighter metrics, and improved efficiency. Customers want patience, empathy, and solutions.

Agents are expected to deliver both: all while navigating complex systems, expanding queues, and performance metrics that rarely reflect the realities of the work.

But the issue isn't that agents are spending too much time with customers. The *real* problem is where that time is being spent.

In many centers, a straightforward

customer request stretches into a lengthy interaction. Not because of the conversation itself but because the agent is navigating various sites, policies, and processes that were never designed to work together.

And then, if the information can't be found, the agent reaches out to someone for help.

In this three-part article, I explore how contact centers can reduce average handle time (AHT) without rushing either the customer or the agent.

Part 1 covered removing customer friction before the call. Part 2 (here) focuses on agent performance strategies and methods. Finally, Part 3 will discuss

having the right people in the right place and the tools to help them; it will also present the conclusion.



**TOO MANY
TRAINING
PROGRAMS
RUSH THROUGH
TOOLS,
ASSUMING
AGENTS WILL
FIGURE IT OUT...**

AFTER THE AGENT SAYS HELLO

Once the customer reaches the agent, several operational factors can either accelerate or slow resolution.

1 QUALITY TRAINING

Whether an agent is learning a simple, transactional queue or a highly complex one, the goal of training should be the same: prepare them for the reality of live calls.

Effective training goes beyond a single method. The strongest programs use a blend of instructor-led training (ILT), web-based training (WBT), mentoring, call recordings, job aids, and regular knowledge checks.

This mix helps agents understand not only *what to do*, but *why they're doing it*: an essential distinction once they begin handling real customers.

Just as important, agents need time to learn the tools they'll rely on every day. CRM applications, knowledge bases, dashboards, AI assistants, and scripts should be introduced early and practiced often using scenario-based training or scavenger hunts.

Too many training programs rush through tools, assuming agents will figure it out once they're on the floor. In reality, uncertainty around tools leads to hesitation to use the tools, longer holds, and higher handle times.

Instead, build practice into training by:

- Allowing agents to navigate systems in safe, low-pressure environments such as classrooms.
- Using scenario-based exercises or role-playing that mirror real call types.
- Reinforcing learning through coached call reviews during nesting.



IN MANY WAYS, AGENTS ARE THE ORGANIZATION'S MOST UNDERUSED DIAGNOSTIC TOOLS: SPOTTING FRICTION LONG BEFORE IT SHOWS UP IN DASHBOARDS OR CUSTOMER COMPLAINTS.

Moreover, training should emphasize FCR *before* speed. When agents are unsure, they compensate by placing customers on hold, escalating unnecessarily, or double-checking information. *All of which quietly inflate handle time and erode confidence on both sides of the call.*

And when training is rushed, agents may answer calls faster, but they often place customers on hold, escalate unnecessarily, or provide incomplete answers, leading to repeat calls and frustrating agents to the point of leaving.

But when agents feel confident in their knowledge, tools, and decision-making, handle time improves naturally.

2 LISTENING TO AGENTS

Asking agents for feedback through structured surveys is one of the most practical - yet often overlooked - ways to improve both handle time and customer experience (CX).

Agents operate at the intersection of customers, systems, and policies every day, giving them visibility into operational friction.

In many ways, agents are the organization's most underused diagnostic tools: spotting friction *long* before it shows up in dashboards or customer complaints. Agent feedback can uncover insights that reports often miss, such as:

- Common customer questions and effective resolution strategies.
- Repetitive issues that could be addressed through automation or self-service.
- Gaps in training, knowledge resources, or system usability.
- Process steps that create unnecessary delays or frustration.

Agents also bring valuable perspectives from prior contact center experience. Exposure to different workflows, CRM software, and performance models allows them to identify practical improvements that may reduce handle time while maintaining strong customer support.

However, collecting feedback is only the first step. The real impact comes from *acting* on it.

When organizations acknowledge agent input and implement even slight improvements - such as updating knowledge articles, simplifying workflows, or clarifying policies - it reinforces trust and encourages continued participation.

Over time, this creates a culture where agents feel ownership in improving operations, leading to stronger engagement, better performance, and more sustainable efficiency gains.



3 KNOWLEDGE MANAGEMENT

If there is one area where contact and call centers unintentionally inflate handle time, it's knowledge access.

Outdated articles, poorly structured knowledge bases, and multiple sources of truth force agents to search, cross-check, and second-guess themselves. This results in longer holds, inconsistent answers, and customers hearing the agents' hesitancy, prompting them to call back to verify the information.

THE DIFFERENCE COMES DOWN TO HOW WELL THE AI IS TRAINED AND HOW RELIABLE, WELL-STRUCTURED, AND CONCISE THE INFORMATION IN YOUR KMS IS.

Even small delays - a minute searching here, a hold there - compound quickly across hundreds of calls, turning knowledge friction into one of the biggest hidden drivers of AHT.

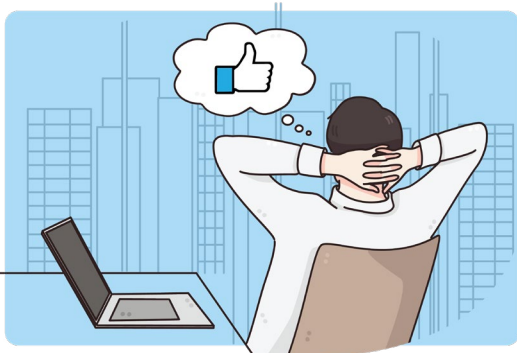
Modern knowledge management systems (KMS) - especially those designed for agent use during live calls - can dramatically reduce AHT by:

- Providing clear, step-by-step guidance.
- Retrieving the right information based on the call context.
- Reducing time spent searching or escalating inquiries.

Then again, to make things even easier on the agents, use AI chatbots trained on your KMS information. Here, an agent enters a question and receives a quick response, rather than trying to find the right page or quick reference guide (QRG). This supports the agent without interrupting the conversation.

But when implemented poorly, these tools overwhelm agents with too many suggestions or surface incorrect information.

The difference comes down to how well the AI is trained and how reliable, well-structured, and concise the information in your KMS is. Agents will only rely on knowledge tools they believe are accurate, current, and easy to use.



As one recurring sentiment from agent communities suggests: *"If I trusted the knowledge base, I wouldn't need to put customers on hold."*

Efficient KMSs reduce search time and build the agents' trust in them. I explore this further in ["Unlocking the Call Center Possibilities With KMS"](#), where I discuss how structured knowledge supports both agent performance and customer satisfaction.

4 AGENT-FRIENDLY DASHBOARDS

In many contact centers, agents spend more time navigating the CRM than talking to the customer. Multiple tabs, slow load times, duplicate data entry, and unclear workflows quietly add minutes to every interaction. These minutes never show up on coaching dashboards, but influence handle time and agent frustration.

Agents often describe it bluntly in on-line forums:

"The call would be easy if the system didn't fight me the whole time."

An effective agent dashboard applies core user interface (UI) principles to reduce effort during live calls. This includes thoughtful use of color to draw attention to critical fields, a layout that follows the natural flow of the conversation, and intuitive placement of buttons and actions agents use most frequently.

Designing dashboards with agents in mind starts with a simple question: What information does an agent need at the exact moment they are helping a customer?

But rather than guessing, involve agents in the design: allowing them to navigate the dashboards, test workflows, and provide feedback. This hands-on input helps uncover what truly matters during live interactions and what gets in the way.



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A few high-level principles to keep in mind include:

- Single-screen views with customer histories, account details, and case status.



- Context is carried forward, so agents don't have to re-ask questions or re-enter information.
- Logical workflows that match real call flows: not idealized process maps.
- Fast performance, especially during peak call volumes.



WHAT INFORMATION DOES AN AGENT NEED AT THE EXACT MOMENT THEY ARE HELPING A CUSTOMER?

When dashboards are designed around real call flow instead of system logic, agents spend less time navigating and more time resolving. This theme carries directly into staffing and tool decisions that I will cover in Part 3. [🔗](#)



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.

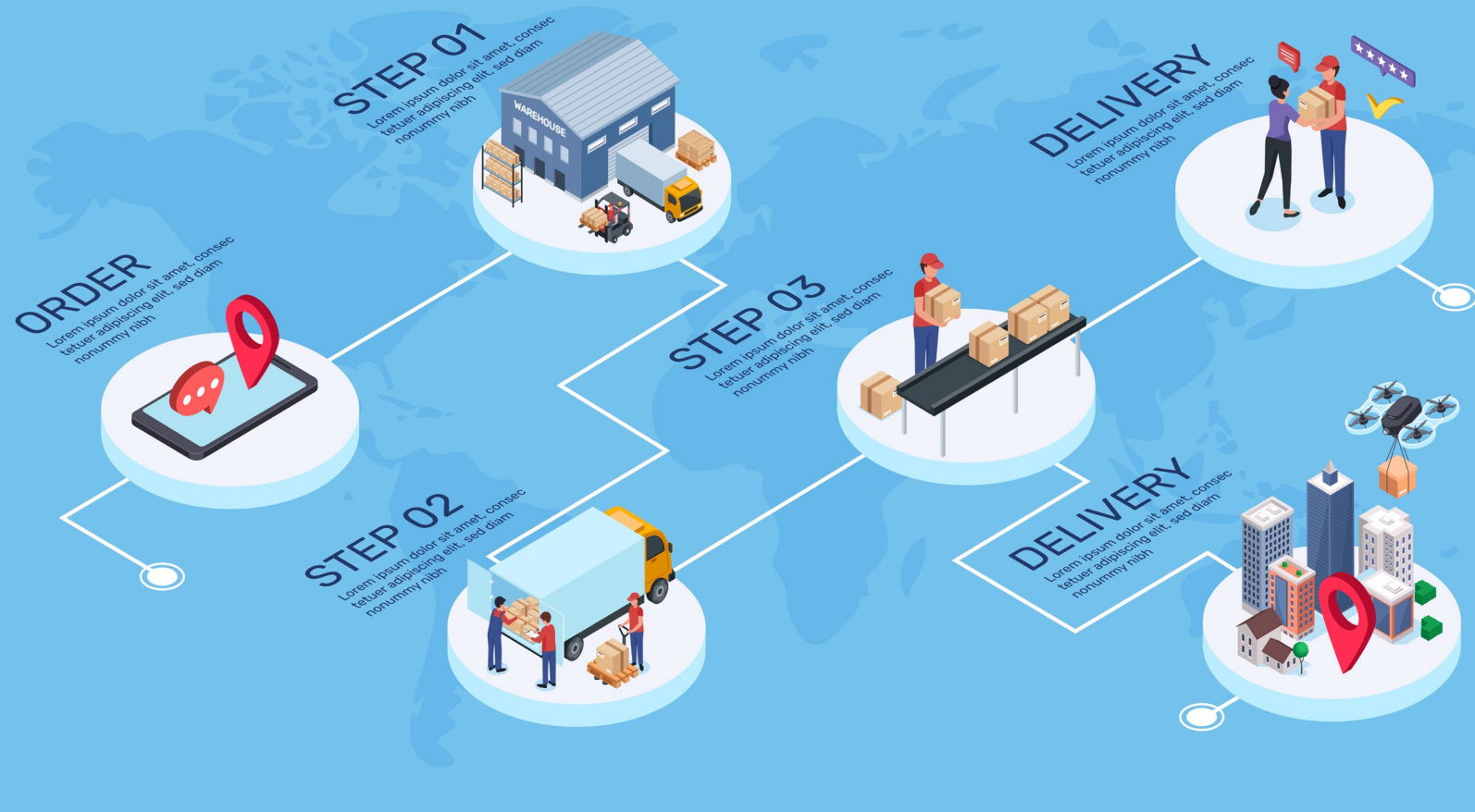


ILLUSTRATION PROVIDED BY ADOBE STOCK

WHY SUPPLY CHAIN SUCCESS IS CUSTOMER SUCCESS

HOW YOUR CONTACT CENTER CAN HELP FIX ISSUES.

The journey of a product from creation to customer is a complex dance of precision and timing. When the choreography is flawless, the result is a seamless experience. The customer receives their order on time, the product meets their expectations, and any interaction with your company is a positive one.

But when a single step is missed - a delay in shipping, an inventory error, a breakdown in communication - the entire performance can unravel.

This chain reaction doesn't stop at the warehouse door. It ripples outward, impacting everything from operational efficiency to brand reputation, with the contact center often feeling the most immediate shockwaves.

A well-oiled supply chain is the unsung hero of exceptional customer experience (CX). It's the invisible framework that supports every promise your brand makes.

Conversely, a flawed supply chain is a

primary driver of customer frustration and operational strain. Understanding this connection is the first step toward building a more resilient, responsive, and customer-centric business.

Here, we will explore the critical link between your supply chain and your customers' happiness. We'll examine where things typically go wrong, how to fix them, and most importantly, how to leverage customer feedback to create a cycle of continuous improvement.

WHERE THE CHAIN BREAKS

Supply chains are intricate systems with numerous potential points of failure.



Identifying these vulnerabilities is crucial for proactive management. While every industry has its unique challenges, several common weak links appear across the board.

1 INVENTORY INACCURACIES

One of the most frequent culprits is a mismatch between digital records and physical stock. This can stem from manual data entry errors, poor system integration, or a lack of real-time visibility.

The consequences? Here's an all-too-common example:

A customer orders an item that your system says is available, only to be told later that it's out of stock. This immediately creates a negative experience and triggers a call or email to your contact center, increasing their workload with a problem that was *entirely preventable*.

2 LAST-MILE DELIVERY HICCUPS

The final leg of the journey - from the distribution center to the customer's doorstep - is often the most fraught with peril. It's also the part of the process most visible to the customer.

Delays caused by inefficient routing, carrier issues (that can include accidents, equipment problems, labor disputes, lack of crews, weather), lengthy Customs checks, or incorrect address data can turn an anticipated delivery into a source of anxiety.

When an order is late or lost, the customer doesn't call the shipping carrier; they call *you*. Your contact center agents are then tasked with solving a logistics puzzle they have little control over.

3 POOR SUPPLIER AND PARTNER COMMUNICATION

Your supply chain is only as strong as its weakest partner. A breakdown in communication with a supplier, a third-party logistics (3PL) provider, or a freight forwarder can bring operations to a halt.

A missed production deadline or a delayed raw material shipment isn't just an internal problem. It directly translates to unfulfilled customer orders and a surge in "Where is my order?" (WISMO) inquiries, which are a significant and costly burden for contact centers.

MITIGATING SUPPLY CHAIN DISRUPTIONS

When a disruption occurs, the immediate goal is to resolve the customer's issue. However, the long-term strategy must focus on prevention. A purely reactive approach is a recipe for escalating costs and eroding customer trust.

The first step is gaining end-to-end visibility. It's impossible to manage what you cannot see.

Implementing technology that provides a single, real-time view of your entire supply chain - from procurement to final delivery - is no longer a luxury; it's a *necessity*. This allows you to spot potential bottlenecks *before* they become critical failures.

EVERY TIME A CUSTOMER CALLS ABOUT A LATE DELIVERY, A DAMAGED ITEM, OR A STOCK DISCREPANCY, THEY ARE HANDING YOU A PIECE OF DATA.

Next, diversify and strengthen your partnerships. Relying on a single supplier or carrier creates significant risk.

Building a robust network of trusted partners provides flexibility and redundancy. When one route is disrupted, you can quickly pivot to another. Clear service level agreements (SLAs) and collaborative communication channels ensure all parties are aligned and accountable.

Finally, automate where it makes sense. Manual processes are prone to human error.

Automating tasks like data entry, inventory tracking, and order processing not only increases efficiency but also dramatically improves accuracy. This reduces the likelihood of stockouts and fulfillment errors, directly cutting down on the volume of problem-related inquiries reaching your contact center.



THE OVERLOOKED GOLDMINE: YOUR CONTACT CENTER DATA

Many organizations view their contact center as a cost center: a necessary function for handling complaints.

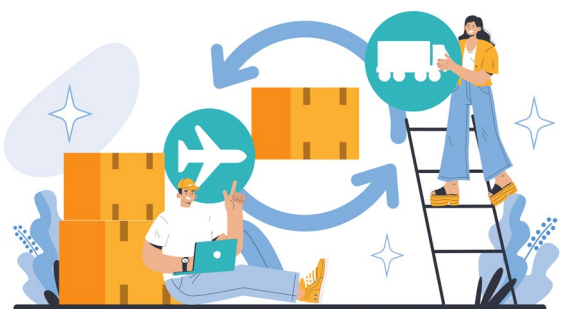
This is a missed opportunity. Your contact center is one of the most valuable sources of business intelligence you have. It's a real-time listening post that captures raw, unfiltered feedback directly from your customers about what is and isn't working.

Every time a customer calls about a late delivery, a damaged item, or a stock discrepancy, they are handing you a piece of data.

When analyzed collectively, these individual data points reveal patterns. Are you seeing a spike in calls about damages from a specific shipping lane? Are customers in a particular region consistently reporting delays? *This is not just customer feedback; it's critical supply chain intelligence.*

By integrating contact center data with your supply chain management systems, you can create a powerful feedback loop.

Agents can do more than just apologize for issues; they can categorize the root causes. Advanced analytics can then transform this categorized data into actionable insights for the logistics team, enabling them to address systemic problems rather than just individual symptoms.



...GETTING THE SUPPLY CHAIN RIGHT MEANS RECOGNIZING THAT IT'S NOT A BACK-OFFICE FUNCTION, BUT A CORE COMPONENT OF YOUR CX STRATEGY.

BEST PRACTICES FOR A RESILIENT, CUSTOMER-FIRST SUPPLY CHAIN

Building an organization where the supply chain serves the customer requires a strategic and integrated approach. It's about more than just moving shipments efficiently; it's about aligning your entire operation around the end-user experience.

• **Unify Your Technology Stack.**

Ensure your eCommerce platform, inventory management system, and CRM applications are seamlessly integrated. A unified view of data eliminates silos and provides a single source of truth for everyone: from the warehouse manager to the contact center agent.

• **Empower Your Contact Center.** Give your agents visibility into the supply chain. When they can see real-time order status, inventory levels, and shipping information, they can provide customers with accurate, immediate answers instead of escalating inquiries. This resolves issues faster and improves first contact resolution (FCR) rates.

• **Establish a Formal Feedback Loop.** Create a structured process for channeling insights from the contact center back to the supply chain and operations teams. Hold regular cross-departmental meetings to review trends in customer complaints and collaboratively develop solutions.

• **Invest in Predictive Analytics.** Move beyond tracking what happened and start predicting what will happen. Leveraging AI and machine learning can help you anticipate demand fluctuations, identify potential delivery risks, and optimize inventory levels to prevent both stockouts and overstocking.

Ultimately, getting the supply chain right means recognizing that it's not a back-office function, but a core component of your CX strategy. Each step in the process is a domino that, if it falls, will inevitably impact the next, with the final one landing squarely on your customer.

By building a transparent, resilient, and data-driven supply chain, you are not just optimizing logistics; you are building a foundation for lasting customer loyalty and sustainable growth. 



Nimesh Akhauri, CEO, The DDC Group, brings over 25 years of BPO and technology leadership experience - ranging from client management and worldwide delivery of business process transformation - to functional and operational roles focused on growth across wide-ranging industry verticals, products, service lines, and geographies.

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WHY SCREENING HARDER WON'T WIN

THERE IS A NEW APPROACH TO ATTRACTING AND KEEPING TALENT.

Contact centers must deliver more than they ever have before. Interactions are more complex, customers are less patient, products are more configurable, and channels now span voice, chat (including video), email, and social platforms.

In response, organizations have steadily raised the bar for what “good” talent looks like. In this article, which I have divided into three parts, I focus on three skill areas where the hiring bar is rising fast.

I covered digital and AI literacy in [Part 1](#) and emotional intelligence in [Part 2](#). Language skills is examined here in [Part 3](#), along with the conclusion for all three parts.

LANGUAGE EXPECTATIONS AND SKILLS

Language expectations in contact centers have changed meaningfully over the last decade. Language proficiency is increasingly being treated as a core job skill rather than as a hiring preference.

In North American contact centers, this most often begins with English proficiency. But increasingly it extends to Spanish, Canadian French, and in some markets, additional languages such as Mandarin (Chinese) or Russian, depending on the customer base and delivery model.



But these rising expectations apply whether customer interactions are handled domestically or through global BPO partners serving U.S., Canadian, and other global customers.

This includes English and increasingly Spanish for domestic U.S. interactions, as well as additional languages when supporting customers across global delivery models.

Representatives may be expected to communicate not only with customers, but also with colleagues, supervisors, and partners across regions and languages.

Organizations are increasingly adopting CEFR (the Common European Framework of Reference for Languages) as a standardized way to define language proficiency.

In practical terms, a B1 CEFR level represents functional fluency with limitations, B2 represents confident professional fluency in most workplace situations, and C1 represents advanced fluency, including nuance, speed, and precision.

While no publicly available longitudinal dataset tracks CEFR thresholds in contact center hiring over time, my experience over the last 15 years suggests the bar has steadily risen.

Organizations are increasingly requesting higher CEFR minimums alongside additional expectations such as multilingual capability, regionally neutral speech, and stronger written proficiency.

Roles that once commonly accepted B1 or B1+ proficiency, now more frequently target B2, with many segments targeting or moving steadily toward targeting C1.

BUT IS PROFICIENCY KEEPING PACE?

The challenge is that language supply may not be rising as quickly as language expectations.

Large-scale measurement suggests domestic U.S. and global English language proficiency has softened in recent years, even as employers increasingly standardize and raise language benchmarks.

Similar constraints appear in other languages, where supply is shaped by education systems, immigration patterns, and regional exposure rather than by employer demand alone.

This shift reflects genuine business needs. Contact centers have expanded beyond voice into chat, email, and social support (including with video), where language quality is more visible and less forgiving.

Candidates are expected to demonstrate clarity, precision, tone management, and brand alignment in real time, both in conversation and in writing. Poor communication creates friction, repeat contacts, escalation volume, and dissatisfaction.

However, the way language requirements are applied matters. When standards shift from functional clarity to subjective notions of polish or “accent neutrality,” organizations risk filtering out candidates who can do the work but do not conform to informal language norms.

Non-native speakers, immigrant populations, and candidates from global or non-traditional backgrounds may be disproportionately impacted: even when their job performances would meet or exceed expectations.

OVERSCREENING RISKS

Language measurement also introduces practical complications. CEFR is designed to describe general language proficiency across broad contexts, *not* the specific language demands of customer service work.

Many contact center interactions rely on a narrower set of vocabulary and grammatical structures than a generalized B2 or C1 benchmark might assume.

As a result, organizations can overscreen candidates for generalized proficiency, rather than focusing on whether candidates can perform the language tasks that matter most on the job:

- Listening accurately.
- Clarifying needs and confirming understanding.
- Explaining options clearly and concisely.
- Documenting interactions appropriately.
- De-escalating conflict effectively.

In practice, this can create a mismatch between what a job requires and what generalized proficiency testing measures.

When B2 or even C1 proficiency becomes a default standard for customer service roles, pass rates can drop sharply, even among candidates who are capable of delivering clear and effective customer interactions.

High-frequency support tasks rely on clarity, listening accuracy, tone control, and precise problem explanation. They rarely require advanced vocabulary or academic nuance.

The risk is subtle but significant: language standards can drift toward sophistication instead of clarity. When that happens, organizations are no longer screening for customer-ready communication. They are screening for linguistic polish.

Employers can end up filtering for “Shakespeare” when what the job requires is someone who can confidently say: “I apologize for the issue; let me fix it for you.”

LANGUAGE PROFICIENCY IS INCREASINGLY BEING TREATED AS A CORE JOB SKILL...

THE STAFFING PIPELINE ISSUE

There is also a broader staffing pipeline issue that is easy to overlook. Historically, contact centers served as an on-the-job language development engine across many languages.

Many candidates entered the industry with functional proficiency and built job-relevant fluency through repetition, coaching, call exposure, quality monitoring, and daily immersion.

But as automation and AI absorb more routine interactions, the remaining human work becomes more complex and emotionally demanding.

The “entry-level” opportunities that once helped people build language skills on the job may shrink, even as expectations for accuracy, tone, and written clarity continue to rise.

The challenge is not setting language standards. It is ensuring those standards are job-related, measurable, and realistically attainable.





If AI takes the entry-level work, where does the next generation of contact center talent build the skills required to do the advanced work?

Organizations have responded to these pressures with the following two strategies.

1 AI-enabled translation, transcription, and language enhancement tools.

These technologies have improved rapidly and can support comprehension, documentation, and consistency. *However, they are not yet reliable substitutes for real-time customer communication in complex or emotionally charged interactions.*

Automated translation often struggles with nuance, cultural context, and escalation scenarios; it still requires agents to recognize when outputs are incomplete or incorrect.

In practice, these tools tend to augment language capability rather than replace it. They shift skill requirements toward verification and judgment rather than eliminating them.

2 Translation services or nearshore and offshore BPO models to access multilingual talent pools.

These strategies can expand language coverage, but they introduce their own constraints, including cost, latency, data security considerations, and variability in customer experience.

They also relocate the language challenge rather than removing it. Language proficiency still needs to be defined, measured, and managed within those delivery models.

Importantly, these two strategies are not currently leading organizations to lower language standards. In many cases, higher CEFR thresholds were introduced because existing proficiency levels did not deliver acceptable outcomes. Those thresholds remain in place because quality pressure has not disappeared.

In my practice, I'm seeing that technology and delivery model adjustments are being used to help organizations meet elevated expectations more consistently, not to justify relaxing them.

While some organizations are exploring whether better tooling may eventually allow more flexible language requirements, CEFR benchmarks often remain high or continue to rise in the near term.

What these responses share is that they help organizations manage rising language demand, but they do not resolve the underlying pipeline issue.

As language expectations rise, organizations still need a sustainable supply of talent who can listen accurately, communicate clearly, de-escalate effectively, and document interactions correctly.

Overreliance on technology or delivery model shifts risks masking capability gaps rather than addressing how language skills are built, measured, and developed over time.

AS LANGUAGE EXPECTATIONS RISE, ORGANIZATIONS STILL NEED A SUSTAINABLE SUPPLY OF TALENT...

ENSURING LANGUAGE STANDARDS: AND STAFFING

The challenge, then, is not whether to set language standards. It is whether those standards are job-related, measurable, and realistically attainable.

If automation absorbs the work that once supported language development, organizations must be deliberate about where and how the next generation of contact center talent will build the skills required to perform the more advanced interactions that remain.

Language proficiency is a legitimate and necessary requirement for modern contact center roles. Rising expectations around clarity, tone, and written communication reflect real business needs, not arbitrary preferences. *The risk is not in setting high standards, but in how those standards are defined and applied.*

When generalized proficiency benchmarks such as CEFR are used as blunt screening tools, organizations risk over-filtering for linguistic sophistication rather than customer-ready communication.

Technology, translation services, and delivery model shifts may help organizations meet elevated expectations. But they do not eliminate the need for job-relevant language skills or solve the underlying measurement challenge.

The more sustainable path is to define language requirements in terms of the specific communication tasks the job demands and to measure those skills directly.

Without that precision, rising language standards risk narrowing the talent pipeline without delivering commensurate improvements in customer outcomes.

CONCLUSION

Contact centers are raising skill expectations across digital and AI literacy, emotional intelligence (EI), and language at a pace that labor markets are unlikely to match.

In many regions, the pool of candidates who meet these standards is not expanding fast enough to fill demand. Especially when requirements are screened through proxies such as prior experience, subjective language norms, or impressions of professionalism.

The predictable response is to screen harder. But that is a skills race contact centers *cannot win*.

If organizations respond by screening harder instead of building measurable pathways to readiness, the gap between rising skill demands and available talent will continue to widen.

The burden will fall on candidates who lack traditional signals of readiness, regardless of their ability to succeed. Hiring becomes slower, more expensive, and less sustainable. Over time, performance pressure increases while workforce stability declines.

The answer is not raising the bar. It is redefining it and measuring it well. **Raise standards, not barriers.** 📌



April Cantwell, Ph.D., is Director of People Science at Harver, where she helps organizations turn hiring data into better decisions and better outcomes. For more than 20 years, she has worked at the intersection of applied research and real-world talent strategy, specializing in assessment design, workforce analytics, and practical, evidence-based hiring.



ILLUSTRATION PROVIDED BY ADOBE STOCK

BEYOND SPREADSHEETS

HOW NO-CODE TOOLS CAN POWER CONTACT CENTERS.

The contact center is both the heart and the headache of customer engagement for most businesses. Managing tickets, tracking leads, scheduling agents, and monitoring performance can lead to juggling spreadsheets or paying for solutions that are too rigid or limited in their ability to adapt.

But as data volumes grow and customer expectations rise, spreadsheets can't always keep up. They're not designed for complex relationships between data, such as linking customers to cases or calls to outcomes. The result is inefficiency, duplication, and frustration on both sides of the conversation.

The issue is particularly acute for small-mid-sized businesses (SMBs). They have a great need for delivering excellent customer experiences (CXs) as part of their market differentiation, and for increasing productivity and controlling costs to grow their profitability.

This is where databases can be a powerful solution that can empower managers and non-technical employees to design complex workflows themselves, without the need for cost-prohibitive IT resources. But traditional databases have their own issues.



SPREADSHEETS STRAIN CX

Organizations that rely on legacy tools – like spreadsheets – often encounter digital bottlenecks, which limit visibility, speed, and scalability.

SMBs' small contact centers experience these challenges every day:



...AS DATA VOLUMES GROW AND CUSTOMER EXPECTATIONS RISE, SPREADSHEETS CAN'T ALWAYS KEEP UP.

- Supervisors manually consolidate call logs, quality metrics, and agent schedules across dozens of spreadsheets and forecast staffing needs without reliable data.
- Agents search customer histories that are scattered across numerous file structures and data repositories.

When different team members create spreadsheets based on their own formats and preferences, managers often spend significant time consolidating data. This can lead to manual errors and raise concerns about data accuracy.

When systems don't talk to each other, it's the customer who feels it first: through slower response times, missed follow-ups, and inconsistent service.

Small inefficiencies compound quickly. In an environment where a single poor interaction can damage loyalty, operational agility becomes a competitive differentiator.

The upshot is that spreadsheets are *not* databases. While they remain a useful starting point, relying on them as the sole system of record introduces significant risks: inefficiencies, errors, lack of scalability, and weak data security.

When used in this manner, then, spreadsheets quickly become limiting, inefficient, and prone to errors. You are asking it to do more than what they are designed for.

ENTER COMPLEX DATABASES

A database, in contrast, is an organized collection of structured information stored electronically for efficient access, management and retrieval. Databases can manage enormous volumes of information across sales, customer records, inventory, financial transactions, and even real-time web content.

Databases are the backbone of modern digital experiences. They power everything from online banking and eCommerce to logistics systems and social media platforms.

Today's databases enable businesses to connect disparate data sources, enforce data integrity, and automate workflows. They allow teams to query information instantly, generate reports, and uncover insights that drive smarter decision-making.

But traditional database platforms have required complex coding – and the not inexpensive expertise to write it – to customize and adapt applications to specific needs. Coding also takes time: including testing to make sure it works. And SMBs have neither the financial resources nor the time for complex IT.

NO/LOW CODE ALTERNATIVE

No-code platforms and low-code tools offer a new path forward. They enable non-technical users—such as operations managers, team leads, or even frontline agents—to design and automate their own workflows without relying on an IT department or external developer.

- Low-code tools use graphical interfaces (aka drag-and-drop) to write customized applications, requiring minimal IT expertise.
- No-code platforms avoid having to write *any* code.

Imagine creating a lightweight customer relationship tracker or a performance dashboard just like designing a spreadsheet form for people to fill out: no SQL. This takes advantage of the fact that everyone is so used to spreadsheets, and there is no steep learning curve.

These tools function like familiar spreadsheets but act like databases, linking calls to customers, customers to tickets, and tickets to outcomes in a single centralized system.

That kind of visibility helps SMB contact centers move faster, spot trends earlier, and deliver a more consistent CX.

EMPOWER THE "CITIZEN DEVELOPER"

This trend, often referred to as the citizen developer movement, is transforming the way SMBs operate.

Gartner defines a citizen developer as "an employee who creates application capabilities for consumption by themselves or others, using tools that it does not actively forbid."

In SMB contact centers, this can mean:

- A supervisor develops a shift scheduler to balance workloads automatically.



- A sales agent creates a follow-up tracker that syncs with email.
- A QA manager designs a scoring system that updates in real time.

Empowering staff closest to the work to create their own solutions means the business can move faster and more nimbly, freeing leadership to focus on strategy instead of troubleshooting.

This is known as "innovation at the edges": enabling everyday employees to identify problems and develop the tools to address them.

For SMB contact centers, it's not just about cutting costs; it's about unleashing agility and insight from within the team. The best application is one that not only fits the team's workflow perfectly but also stays nimble: able to take in team insights and adapt as the business landscape keeps changing.

BUILDING A MORE ADAPTABLE BUSINESS

No-code platforms show their power when businesses layer automation into their workflows:

- Like generating a follow-up email when a ticket's status changes.
- Or alerting a manager when an SLA is about to be breached.

Such automated moments can have an outsized impact on response times, accuracy, and employee satisfaction.

Even data visualization—once the domain of analytics pros—becomes accessible. Managers can build dashboards showing call resolution rates or customer sentiment, updating live from the same central data source.

Instead of spending hours reconciling reports, managers can then focus on coaching agents and improving outcomes.

This approach creates a culture of problem-solving. Why? When employees feel empowered to design their own digital tools, they take greater ownership of the systems and data that shape customer interactions.

It's a subtle shift—from users of technology to co-creators of it—that helps small teams punch well above their weight.

TANGIBLE BENEFITS FOR CONTACT CENTERS

The advantages of adopting no-code tools are evident in environments where efficiency and responsiveness matter most:

- **Cost savings:** Build and maintain your own systems instead of outsourcing.
- **Speed:** Launch new workflows or reports in days, not months.
- **Customization:** Tailor solutions to the way your agents actually work.
- **Collaboration:** Maintain consistent and accessible customer data across teams.

Instead of wrangling disconnected spreadsheets, a contact center can create a single system for managing customer interactions—from initial inquiry to resolution—and easily evolve that system as needs change.

FROM DIGITIZATION TO DIFFERENTIATION

Digital transformation can feel out of reach for smaller organizations that lack full-time IT staff. But the new wave of low/no-code tools changes that equation.

The most successful organizations are those that distribute digital capabilities

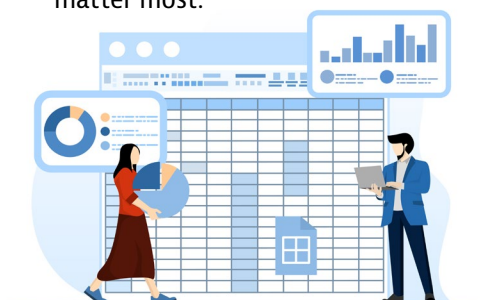
widely, rather than concentrating them solely in IT. For SMB contact centers, that distribution can mean better service, happier customers, and a workforce that continually refines its operations.

THIS APPROACH CREATES A CULTURE OF PROBLEM-SOLVING.

No-code doesn't just modernize the contact center: it democratizes it. It empowers every team member to build, improve, and adapt, resulting in CXs that are more efficient and more human.👤



Jeff Kuo is the CEO and founder of Ragic Inc. and has been working in the tech industry since 2003. Jeff loves using tech to solve problem and enjoys all kinds of outdoor activities but isn't particularly good at any of them. Loves playing with his two kids, but they drive him nuts on a daily basis.



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HOW BEST TO SERVE LATAM CUSTOMERS

WHY A MARKET-BY-MARKET STRATEGY IS ESSENTIAL.

For many global brands, Latin America or LATAM is still treated as a single contact center market. It isn't.

The region spans dozens of countries with distinct languages, dialects, cultures, labor markets, regulatory environments, and levels of digital maturity.

Yet too often, many companies apply a one-size-fits-all operating model, assuming that what works in one country will translate seamlessly across the rest of the region.

Customer expectations have risen sharply across global markets. According to [Salesforce](#), 80% of customers say the experience a company provides is just as important as its products or services,

and nearly nine in 10 say strong customer service increases their likelihood to remain loyal.

For global and local decision-makers about outsourcing in Latin America, that means service quality and consistency matter as much as - if not more than - geography or cost.

BPO organizations like us are now approaching this challenge through a "total experience" lens: recognizing that customer experience (CX), employee experience (EX), partner experience, and operational execution are deeply interconnected. That gains in one area are difficult to sustain without alignment across the others.

After more than two decades building and operating contact center programs across Latin America, one lesson stands out clearly to me: *success in the region depends on intentional, market-by-market design, not templates.*



SUCCESSFUL LATAM OPERATIONS ACCOUNT FOR CULTURAL DIFFERENCES BY DESIGN.

UNDERSTANDING THE DISTINCT MARKETS

In practice, successful contact center strategies in Latin America depend on understanding how national differences - from language and culture to labor dynamics and customer expectations - influence both service delivery and performance.

Recognizing and planning for these differences is one of the most important steps contact center leaders can take to deliver consistent, high-quality CXs across the region.

Brazil, for example, operates in a category of its own. Portuguese-language requirements, unique cultural norms, and local market dynamics make it fundamentally different from Spanish-speaking countries.

As a result, most U.S.-focused contact center operations in Latin America are concentrated in Spanish-speaking markets. But even within that group, there is significant variation.

And over the past decade the capability and readiness of the Spanish-speaking portion of the region has changed dramatically:

- English proficiency, digital connectivity, and operational maturity have all advanced considerably.
- Increased access to education, global media, international travel, and reliable broadband has expanded the talent pool and raised the ceiling on what LATAM-based teams can support.

Countries like **Colombia** and **Chile** illustrate how these differences translate into real-world operating decisions:

- **Colombia** offers scale, a large and increasingly bilingual workforce, and proximity to North American time zones, making it well-suited for larger programs.
- **Chile**, while smaller, delivers strong quality, stability, and cultural alignment, which can be especially attractive for small- to mid-sized operations that value consistency and long-term retention.

Beyond these two markets, other LATAM countries play more specialized roles:

- **Mexico** has a large domestic contact center market, though it is typically better suited for serving local demand than U.S.-focused nearshore programs.
- **Argentina** offers strong human capital and a capable workforce, but higher volatility and labor complexity often require a more deliberate program design.
- **Panama** and **Costa Rica** deliver high quality and geographic proximity to the U.S., but at higher costs and with limited scalability, positioning them best for niche or premium use cases.

Emerging markets such as **Peru** are gaining attention as wage dynamics shift across the region, offering growing English-language capability and increasing competitiveness for certain program types. Other markets, including **Ecuador**, remain more constrained due to labor economics and limited English-language availability.

But rather than viewing these differences as constraints, successful organizations treat them as design inputs. The opportunity lies in understanding where each market excels and aligning location strategy accordingly.

From a total experience perspective, this alignment matters not only for customers, but also for agents. Thus ensuring that teams are placed in environments where language, culture, and working conditions support long-term engagement and performance.

WHERE CONTACT CENTER STRATEGIES BREAK DOWN

Organizations that succeed in Latin America tend to share a common approach: they treat transparency and precision as non-negotiable from day one.

Rather than relying on informal processes, leading BPO providers mirror North American expectations for accuracy, directness, and proactive communication across every aspect of service delivery: from reporting and escalation to issue resolution and performance management.



This level of operational discipline has become standard practice among tier one providers, and it is what separates commodity outsourcing from true strategic partnerships.

Successful LATAM operations account for cultural differences by design. Leading providers establish structured communication protocols from the outset: including North American-style reporting cadences, clear escalation frameworks, and full performance transparency.

When these guardrails are in place - which mature BPO partners now provide as standard - cultural differences become advantages rather than obstacles, bringing greater empathy, relationship focus, and customer warmth to service interactions.

Transparency matters more than perfection. Problems will happen in any operation. What customers *cannot* tolerate is feeling misled, underinformed, or surprised. Trust is especially fragile when teams are geographically distant -- once broken, it is extremely difficult to restore.

Recent research underscores how high the stakes have become. According to the Edelman Trust Barometer, trust is now the most important factor shaping long-term relationships between organizations and the people they serve, with transparency, competence, and reliability cited as core drivers of confidence.

In distributed contact center models, where every interaction represents the brand, trust is built - or lost - one conversation at a time.

CHOOSING THE RIGHT OPERATING MODEL, CASE BY CASE

The maturity of Latin America's contact center ecosystem means buyers today have real choice and the data to make confident decisions. In-house, outsourced, and remote models can all be highly effective when aligned to specific program requirements and regional strengths.



THE SAME FORCES THAT HAVE STRENGTHENED LATIN AMERICA AS A CONTACT CENTER DESTINATION... ARE ALSO ACCELERATING THE ADOPTION OF AI ACROSS THE REGION.

Need scale and round-the-clock coverage? Markets like Colombia offer deep talent pools and operational flexibility. Prioritizing quality, stability, and retention for high-value interactions? Chile's consistency excels.

Organizations that match program needs to regional strengths consistently outperform one-size-fits-all approaches, and experienced BPO partners provide this market intelligence as part of the engagement, not as a custom consulting exercise.

Remote and hybrid work has expanded the available talent pool across LATAM. Flexibility allows organizations to attract higher-quality candidates, accommodate different life circumstances, and reduce unnecessary attrition. At the same time, not every employee wants to work remotely, and not every program should.

The strongest models are adaptive. They evolve as customer expectations change, talent markets tighten or loosen, and business priorities shift.

BRINGING AI INTO A MARKET-BY-MARKET STRATEGY

The same forces that have strengthened Latin America as a contact center destination (e.g., expanding talent pools, improving digital infrastructure, and rising customer expectations) are also accelerating the adoption of AI across the region.

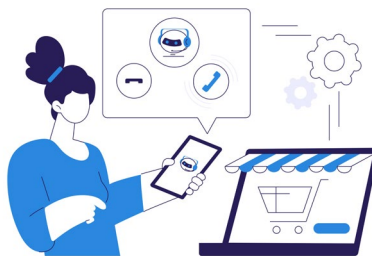
Recent surveys indicate that a growing share of LATAM businesses are already using AI to support operations, particularly in customer analytics and front-office experiences.

At the same time, the call center AI market in Latin America is expanding rapidly, signaling that AI is moving beyond experimentation and becoming a core component of modern service design.

For BPO providers and enterprise leaders alike, the opportunity is not to deploy AI as a one-size-fits-all "LATAM" solution, but to apply it in ways that align with the strengths and realities of individual markets.

As economic and workforce conditions shift from country to country, AI can also help organizations respond more quickly. This allows leaders to rebalance capacity, adjust staffing models, and maintain service levels without disrupting CX or EX.

In higher-volume hubs such as Colombia, for example, AI agents and intelligent virtual assistants can handle routine inquiries in Spanish and English, allowing live agents to focus on more complex, value-driven interactions.



In markets where quality, stability, and long-term relationships are the primary differentiators, such as Chile, AI copilots can support agents by surfacing relevant context, recommending next-best actions, and reinforcing consistent tone and messaging: without diminishing the human connection customers value.

Analytics is where this market-by-market approach becomes especially powerful. Across Latin America, narrowly focused AI systems are already being used to analyze large volumes of interaction data, identify behavioral patterns, and forecast demand with relatively low implementation complexity and clear returns.

When applied at the country or site level, these insights allow leaders to fine-tune training, staffing models, and channel strategies to local preferences: prioritizing messaging apps in mobile-first markets, for example. Or investing more heavily in voice where cultural nuance plays a central role in building trust.

LANGUAGE, CULTURE, AND THE FOUNDATIONS OF TRUST

Language and accent are often discussed superficially in contact center strategy. In Latin America, they are central to trust.

Customers know immediately whether they feel understood. Accent clarity, cultural familiarity, and conversational nuance all shape that perception.

Compared to other offshore regions, Latin America benefits from strong cultural proximity to the U.S.: shared references, similar communication styles, and a high degree of exposure to American culture.

That doesn't mean accents disappear. They don't. But they are far less disruptive to customer understanding than in regions where language structure and cadence differ more significantly. The result is a service interaction that feels more natural and more empathetic.

Cultural fluency matters just as much as language proficiency. Slang, idioms, tone, and context all influence whether customers feel confident that their issue is being taken seriously.

This is where training becomes critical: not only in language mechanics, but in cultural awareness that allows agents to communicate with clarity and credibility.

Ultimately, customers are not evaluating vocabulary. They are evaluating whether someone is listening, understands the issue, and can resolve it: quickly and accurately.

In this way, AI does not replace the need for intentional, market-specific design in Latin America. Instead, it equips contact center leaders with the tools to execute that design with greater precision, transparency, and speed: reinforcing both customer outcomes and employee effectiveness.



THE EXPERIENCE ALIGNMENT MOST COMPANIES OVERLOOK

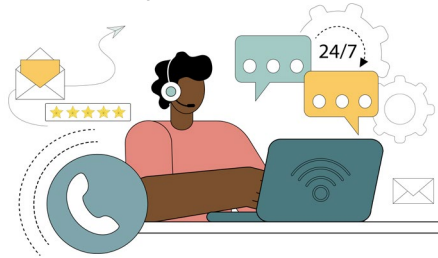
One principle underpins all successful LATAM contact center strategies: *CX cannot improve if EX is neglected*. A true total experience approach recognizes that how agents are trained, supported, and empowered directly shapes how customers experience the brand.

**ONE PRINCIPLE
UNDERPINS ALL
SUCCESSFUL
LATAM CONTACT
CENTER
STRATEGIES:
CX CANNOT
IMPROVE IF EX
IS NEGLECTED.**

Agents who feel respected, supported, fairly compensated, and empowered bring a fundamentally different level of commitment to their work. They take ownership, protect the brand, and fight to resolve customer issues rather than simply closing tickets.

This matters even more when supporting brands that are physically and culturally distant from the region. Agents must feel connected to the customer's business: not just to their own job. That connection does not happen accidentally. It is built through leadership involvement, trust, transparency, and consistent communication.

When organizations align how customers are treated with how employees are treated, performance follows.



RETHINKING SUCCESS IN LATAM

Latin America is no longer an emerging option for contact center operations. It is a mature, capable, and competitive region, but only for organizations willing to approach it thoughtfully.

Success requires abandoning assumptions, investing in cultural understanding, and designing operating models that respect both customers and employees. Companies that do this well don't just reduce costs: they build trust, resilience, and long-term advantage.

The future of contact center excellence in Latin America belongs to leaders who recognize that the region's diversity is not a complication to manage, but a strength to design around. 



Pablo Rosel Estay leads CGS's Chile contact center team in developing and executing sales strategies and leading the expansion of CGS in the LATAM market, as well as maintaining and managing BPO contact center solutions for the Latin America market.

COACH'S CORNER

PART 1

BY MARK PEREIRA



AVERAGE HANDLE TIME VS. HUMAN TIME FINDING THE RIGHT BALANCE IN THE CX AGE.

In today's call and contact centers, agents are caught in the middle of a quiet - but constant - tug-of-war. Leadership wants faster calls, tighter metrics, and improved efficiency. Customers want patience, empathy, and solutions. Agents are expected to deliver both: all while navigating complex systems, expanding queues, and performance metrics that rarely reflect the realities of the work.

Spending time in agent communities on Reddit or Facebook and the frustration is unmistakable: "They want us to be efficient but not rushed. Empathetic, but fast. Knowledgeable, but trained on everything."

In many organizations, average handle time (AHT) has become the most visible battleground between efficiency and customer experience (CX).

**FOR WHEN DONE
RIGHT, EFFICIENCY AND CX
DON'T COMPETE.
INSTEAD, THEY
SHOULD
REINFORCE EACH
OTHER.**

But the issue isn't that agents are spending too much time with customers. The real problem is where that time is being spent.

In many centers, a two-minute customer question turns into a 10-minute interaction because the agent is navigating systems, policies, and processes that were never designed to work together. Too often, contact centers try to improve efficiency at the agent level - shortening talk time, accelerating training, broadening cross-training, and tightening adherence - to name a few.

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DONT MISS OUT!

This month, Mark shares Part 2 of his Coaching series, **Average Handle Time vs. Human Time**. Don't Miss Part 1, published in the May issue.

Stay tuned for **Part 3** next month.

Contact Center
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ILLUSTRATION PROVIDED BY ADOBE STOCK

BREATHING NEW LIFE INTO FCR

HOW MULTIMODAL AI REVIVES IT.

For decades, contact centers have lived with a frustrating paradox: despite better training, routing, and knowledge systems, first contact resolution (FCR) has barely improved. In many organizations, it has even *declined*.

Customers describe their issues in detail, agents follow every troubleshooting step, and yet something is *still* missing. Customers call back, escalations rise, and support costs quietly grow.

The reason is simple. Most AI and support tools only understand *one* dimension of the customer's problem, while real-world issues are *multidimensional*.

To illustrate, a customer may:

- Describe an error, but the real clue is hidden in a screenshot.
- Read out a code, but the root cause becomes obvious only when the agent sees a device's blinking pattern.
- Insist a feature is not working, but the screenshot reveals a configuration mismatch.

Voice alone is no longer enough. Text alone is no longer enough. To solve modern problems on the first attempt,

contact centers need AI that can understand what customers say, what they show, and what they experience.

This is where multimodal AI becomes the missing critical pathway in modern FCR, supplying it with fresh oxygen. It gives agents the same visual and contextual cues customers rely on when they experience issues.



TRADITIONAL AI HAS HIT ITS LIMITS

Most contact centers have already invested in AI. Speech analytics, sentiment detection, auto-summaries, and knowledge recommendations are common.

But these systems nearly all share the same hidden limitation: *they rely almost entirely on text*. Speech becomes text. Chats remain text. Ticket notes become text.

But customers do not experience problems in text. They experience problems in screens, devices, apps, error lights, misconfigurations, environmental factors, and network behavior.

A customer can spend 10 minutes describing what a single picture could clarify instantly. This is why so many calls end with the same sentence: "I just need more information."

This line is the death of FCR. It is where customers fall through the cracks. Not because agents are unskilled, but because their tools are not designed to capture the true context of the issues.

WHAT IS MULTIMODAL AI AND WHY IT HELPS

Multimodal AI is a new class of systems that can understand and combine multiple types of input at once. In the contact center, this includes voice, chat, images, screenshots, video, device logs, telemetry, and contextual signals.

Instead of forcing the customer to translate visual information into words, multimodal AI can see the issue directly. Examples in a contact center workflow include:

- A customer uploads a photo of a router, and AI identifies the model, status lights, and likely errors.

- The customer shows an app screen, and AI recognizes missing permissions or misconfigurations.
- AI reviews a short video and detects unusual device sounds or operating patterns.
- The customer verbally explains the issue, and AI correlates the voice description with visuals and logs.

By merging visual and contextual clues with language understanding, multimodal AI eliminates the ambiguity that causes repeat contacts. And, as I will discuss later in this article, it also sets the stage for the next major evolution in customer service: agentic AI systems.

HOW MULTIMODAL AI REVIVES FCR

Multimodal AI breathes new life into FCR by breaking the expensive cycle of incomplete information. When an agent relies solely on a verbal description, they often troubleshoot the *symptom(s)* described by the customer rather than the *root cause* visible only to the eye.

This creates a cascade of failure; the agent applies the wrong fix based on a guess, the issue persists, the customer calls back, and the cost per resolution doubles.

Multimodal AI mitigates this efficiency loss through three foundational mechanisms.

1. **Eliminates guesswork from troubleshooting.** Most repeat contacts occur because the initial call lacked the right context.

If an agent cannot see the problem, they are forced to rely on the customer's interpretation. If that interpretation is wrong, the troubleshooting is wrong.

For example, a visual clue that is impossible to describe clearly - like a specific artifact on a screen or a frayed cable - becomes immediately recognizable when AI processes an image or video.

This precise diagnosis ensures the *correct* fix is applied the first time, preventing the "bounce back" effect that drives up support costs in:

- Hardware troubleshooting.

- Application configuration.
- Connectivity issues.
- Device setup workflows.
- Subscription or account mismatches.

BY MERGING VISUAL AND CONTEXTUAL CLUES WITH LANGUAGE UNDERSTANDING, MULTIMODAL AI ELIMINATES THE AMBIGUITY THAT CAUSES REPEAT CONTACTS.

Industry analyses of multimodal visual support deployments indicate reductions in repeat contacts, with reported FCR improvements averaging around 22% in select workflows.

2. **Gives AI and human agents full pictures before they act.** Agents

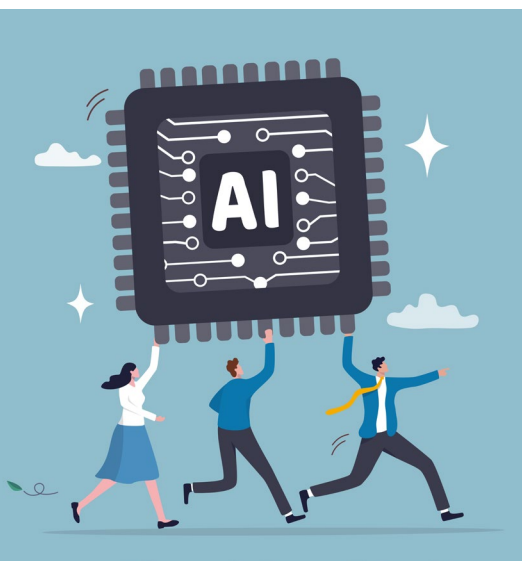
perform complex work while juggling multiple tools and rapidly changing customer explanations.

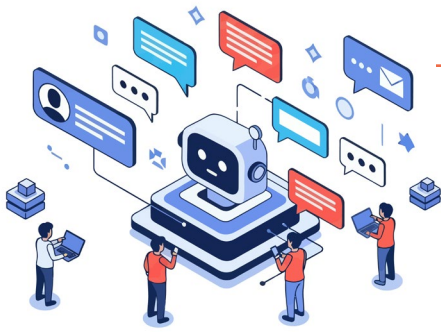
- **What AI agents do:** Analyze visuals and logs, extract key signals, summarize findings in plain language, and detect known patterns to recommend likely fixes.

- **What human agents do:** Interpret the findings, apply judgment, empathy, and decision-making, confirm the path forward, and manage the customer relationship.

This partnership shortens resolution time and increases accuracy.

3. **Reduces unnecessary technician dispatches.** Many field visits, or "truck rolls," happen because the contact center did not have enough information to confidently confirm the root cause remotely.





This is one of the highest costs a service business can incur. Direct operational costs range from \$200 to \$500. But the Technology & Services Industry Association (TSIA) reports that the true cost when factoring in vehicle depreciation, labor burden, and opportunity costs can exceed \$1,000 per incident.

Multimodal AI strengthens that decision point. Here's how.

- **AI agents:** Analyzes visual evidence, matches error states to known failures, validates environment or configuration issues, and predicts whether a field visit is truly required.
- **Human agents:** Makes the final determination, communicates next steps to the customer, and manages expectations.

Across industries, organizations using multimodal visual AI report *an average of 19% reductions in avoidable technician dispatches*, driven by more accurate remote diagnosis and better dispatch decisioning.

THE SEE-SAY-SOLVE FRAMEWORK

In this article I want to introduce the **SEE-SAY-SOLVE methodology** (see **FIGURE 1**), an original operational model for applying multimodal AI in contact center environments to improve resolution accuracy and FCR across enterprise contact centers.

- **Phase 1 (SEE) visual ingestion:** The AI ingests telemetry and visual inputs.
- **Phase 2 (SAY) multimodal contextualization:** The system interprets visual signals into structured text.
- **Phase 3 (SOLVE) execution:** The human agent uses these insights to guide the customer, supported by AI-recommended actions.

This model preserves human leadership and judgment while providing AI-powered clarity.

TELEMETRY-BASED PROACTIVE SUPPORT

While the interactions above describe a customer reaching out to us, the true pinnacle of successful customer service and support, enabled by agentic AI, is when the customer doesn't need to reach out at all.

...THE TRUE PINNACLE OF SUCCESSFUL CUSTOMER SERVICE AND SUPPORT, ENABLED BY AGENTIC AI, IS WHEN THE CUSTOMER DOESN'T NEED TO REACH OUT AT ALL.

By integrating device and system telemetry into the **SEE-SAY-SOLVE** methodology, we can move from reactive ticket-handling to proactive problem-solving that connects machine detection directly to human resolution.

- **SEE (The silent signal):** Instead of waiting for a customer to report a "slow laptop" or "network error," AI agents continuously monitor telemetry streams (e.g., CPU temperatures, application crash logs, battery health cycles).

The AI "sees" the anomaly the moment it deviates from the baseline, often identifying that a hard drive is failing days before the user loses data.

- **SAY (pre-emptive outreach):** Once the signal is caught, the AI triggers a proactive communication flow.

If the issue is critical, the AI prepares a warm handoff summary, translating raw telemetry codes into plain English context. It doesn't just say "Error 404"; it tells the system, *"The user's primary application has failed three times in the last hour."*

- **SOLVE (The empowered handoff):** This is where the connection to the human agent becomes vital. When the customer engages - perhaps via a callback triggered by the AI - they are never asked, "What seems to be the problem?"

That's because the human agent already has the diagnostic data on their screen. They can immediately say, *"I see your device flagged a memory failure this morning. I've already ordered the part for you."*

This seamless thread from the silent telemetry signal to the AI's alert and finally to the human agent's resolution of the issue transforms support from a cost center into a trust-building engine.

Industry analysis confirms the value of this shift. McKinsey reports that AI-driven proactive engagement and communication can reduce cost-to-serve by 20% to 30% while simultaneously boosting revenue by 5% to 8%.

The SEE- SAY- SOLVE Framework

Multimodal AI in contact centers

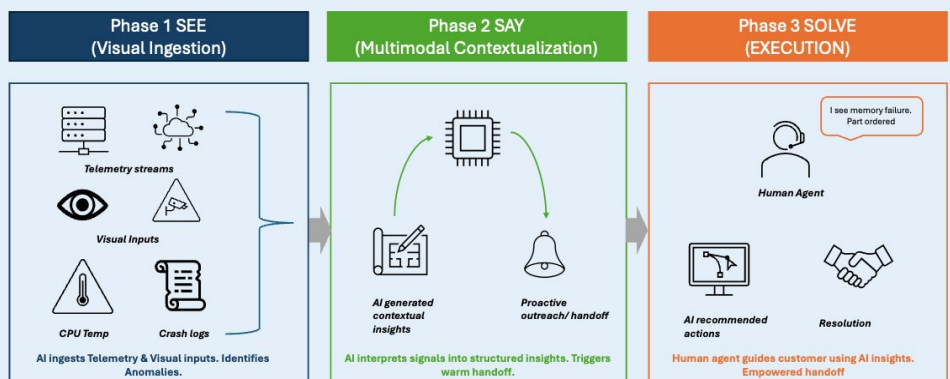


FIGURE 1

WHERE MULTIMODAL AI FITS IN

Multimodal capability integrates smoothly with existing layers in the contact center.

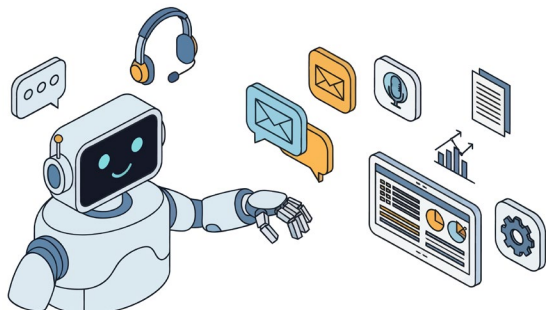
- **Self-service and virtual assistants:** AI handles intake, visual understanding, and simple resolutions.
- **Agent assist:** AI provides real-time context and guidance to agents.
- **Post-call summaries:** AI documents both visual and verbal root causes.
- **Proactive support with telemetry:** As described earlier, AI detects early warning signs, interprets signals, and gives agents the ability to resolve issues before customers experience failure. Thus moving operations from reactive to preventative.

FOUR PRACTICAL STEPS TO START

1. **Pinpoint high repeat contact categories:** Focus on issues where agents repeatedly ask what the customer is seeing.
2. **Enable image or screenshot intake:** This forms the foundation for multimodal understanding.
3. **Train agents on AI-generated insights:** Agents remain the decision-makers. AI enhances clarity.
4. **Start with one journey:** A single high-impact workflow builds momentum and proves value.

THE FUTURE: AGENTIC MULTIMODAL SYSTEMS

Agentic systems, with multimodal AI, are the next level of service and support and FCR. These do not just perceive and summarize problems. They can take safe, reversible actions that shorten time to resolution and reduce operational load.



This shift is accelerating rapidly; Gartner predicts that by 2028, 33% of enterprise software applications will include agentic AI, up from less than 1% in 2024.

Here's how to clearly differentiate the roles played by AI and by people.

What future AI agents will do:

- Interpret visuals, logs, and telemetry automatically.
- Run guided diagnostics without human intervention.
- Validate device states or configurations.
- Trigger safe workflows such as resets or permission checks.
- Resolve simple issues independently.
- Prepare full context packages for human agents on complex problems.

These capabilities will allow entire categories of low-complexity contacts to become fully autonomous, improving speed and reducing cost.

What human agents will focus on:

- Complex, emotionally sensitive, or high-consequence issues.
- Situations with multiple variables or unclear signals.
- Customer reassurance, negotiation, and expectation setting.
- Oversight and approval for agentic workflows.
- Relationship building and brand experience.
- Final decision-making in ambiguous cases.

This division of labor results in a high-efficiency model. Where simple, mid-complexity issues are resolved autonomously by AI, and complex interactions are solved through AI plus human collaboration, not by human effort alone.

Agentic multimodal systems represent a natural continuation of the **SEE-SAY-SOLVE** model. Once AI can see and explain, the next logical step is allowing it to take carefully defined actions.

This is not speculation. The earliest forms of these systems are already emerging across advanced support operations.

FOR THE FIRST TIME, WE HAVE AI THAT CAN UNDERSTAND CUSTOMERS THE WAY HUMANS DO: THROUGH SIGHT, SOUND, AND CONTEXT.

CONCLUSION

For years, contact centers have attempted to improve FCR through better routing, training, and knowledge systems.

But the real barrier was not agent capability. *Instead it was a lack of information and a lack of context.*

Customers experience problems visually. Agents troubleshoot verbally. Traditional AI sits in the middle and fails to connect the two worlds.

Multimodal AI finally bridges this gap, providing that missing link. It replaces heuristic assumptions with deterministic data, gives agents the full picture instead of partial information, and enables resolution on the first attempt instead of repeated frustration.

And by doing so, multimodal AI becomes the foundation for the next frontier: agentic systems that autonomously resolve simple issues, while empowering agents to solve complex ones with more speed, more confidence, and more context than ever before.

For the first time, we have AI that can understand customers the way humans do: through sight, sound, and context. That is why multimodal AI is not just the future of FCR. It is the beginning of a fully agentic support ecosystem.🔗



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ILLUSTRATION PROVIDED BY ADOBE STOCK

SHOULD YOUR CUSTOMERS WORK FOR YOU?

HOW TO MAKE AUTOMATION SUCCESSFUL SO THEY DON'T.

Every customer has felt it. You log into a portal, try to find an answer, and get caught in a maze of automated menus, chatbot responses, and dead-end links. After a few failed attempts, the only solution is to call customer service. By the time a human answers, patience is thin and frustration is high.

That cycle of rising effort and falling satisfaction – resulting in customer friction – is now a defining feature of modern customer experience (CX). The [2025 Liferay Digital Self-Service Report](#) reveals how deep this frustration runs.

- 68% of consumers have abandoned a digital task.

- 73% have skipped a purchase because the process was too annoying.
- 82% said they feel they are doing work that company employees once handled.

These numbers demonstrate that customers are working harder than they should to get basic things done.

This shift carries consequences that extend beyond individual interactions. When people feel they are performing labor for a brand, they lose trust. When their frustration reaches the contact center, it affects both customer relationships and the wellbeing of front-line employees.

This article explores the hidden costs of customer effort and the human toll it takes on service teams. But it also examines the opportunity organizations have to restore balance through better design, smarter orchestration, and renewed empathy.

THE COST OF EFFORT

Customer self-service was built on the simple idea that you can give people the tools to solve their own problems quickly and conveniently.

The promise was efficiency for both sides. But over time, it has eroded. The Liferay survey found that 64% of respondents feel frustrated during digital self-service experiences, and 39% feel exhausted afterward (**see CHART 1**).

When customers sense that a company's systems are designed for internal convenience rather than user success, patience disappears.

The result is dissatisfaction and emotional fatigue. A digital form that rejects an address, a chatbot that loops the same questions, or a portal that times out before completion sends the message that the customer's time is less valuable than the company's.

Each of these moments has a measurable impact.

- Every restart or re-entry increases abandonment rates.
- Every failed self-service attempt pushes volume to the contact center, often at higher intensity.

According to the report, 91% of users have had to restart a digital task after an error. That number represents lost time, lost trust, and increased strain across the organization.

WHEN CUSTOMERS BECOME UNPAID STAFF

One of the most striking findings in the Liferay report is that 82% of respondents feel they are performing tasks that employees once handled. This sentiment signals a major disconnect in how companies view self-service.

Customers now routinely fill out data forms that replicate what agents once

entered. They search for solutions that once came from support staff. They even manage workflows, such as submitting, verifying, and tracking claims or orders, which used to occur behind the scenes.

These activities are framed by companies as empowerment. But they often feel like unpaid labor.

When that labor fails to deliver results, frustration builds quickly. For contact center agents, this has direct consequences. Agents report facing more emotional customers than ever, many of whom are already fatigued by digital systems before they even make a call.

In CX strategy, this is known as the *effort paradox*. As organizations invest in automation, customers feel less supported. They encounter more steps, more screens, and less empathy.

This tension undermines brand loyalty, placing revenues at risk. It also puts additional emotional pressure on the employees who serve as the final human touchpoint, which I am going to discuss in the next section.

THE AGENT EXPERIENCE CONNECTION

The consequence of this effort paradox is most directly felt by the employees who are tasked with being the final point of human contact.

Contact center agents often absorb the emotional residue of poor design decisions. So, when self-service tools fail, they become the safety net for every broken digital interaction.

By the time customers reach the agents, they are *already* drained. These employees then spend time apologizing for systems they did not create, shouldering frustration they cannot resolve alone.

This dynamic has a cost. Emotional exhaustion is one of the leading contributors to agent attrition. Training new staff is expensive, and turnover interrupts service consistency.

More importantly, constant exposure to customer frustration erodes morale. When employees feel powerless to fix root causes, engagement declines.

But improving digital experience is both a customer and employee benefit.

- Every minute spent simplifying a process or clarifying instructions upstream reduces stress downstream.
- The more intuitive a system becomes, the fewer customers call in anger, and the more agents can focus on creating value instead of defusing tension.

I am going to explore this further on, but first let's look at *why* customers experience the issues that lead to customer friction. Namely their inability to realize value from their purchases caused by difficulties in their buying and usage experiences.

FRICTION BY DESIGN

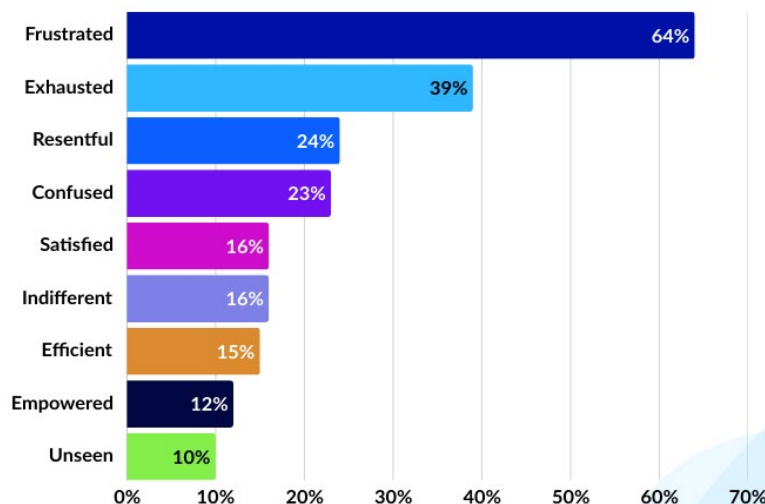
Many of the problems customers face, causing customer friction, are not random errors but are the result of decisions made in isolation.

- Teams optimize processes for efficiency without considering the full journey.
- A marketing department might add extra verification to reduce errors.
- A compliance team might introduce a new confirmation step.

Each change makes sense locally. But they compound friction globally.

CHART 1

How do these "do-it-yourself" online tasks usually make you feel?





Journey orchestration provides a path forward. In marketing, this approach maps each stage of engagement to understand how people move between systems. Applied to CX, it helps identify where confusion or duplication occurs.

- An account recovery process requires multiple password resets across platforms.
- A form designed for internal clarity demands excessive detail from customers.

These insights reveal where effort accumulates. And where small changes can have a big impact.

Designing with empathy means evaluating every step through the customer's eyes.

- Does the interface anticipate what they need next?
- Does it remember progress if they pause?
- Are instructions clear and consistent across devices?

Questions like these translate abstract user experience (UX) goals into tangible improvements.

MAKING SELF-SERVICE WORK AS INTENDED

When designed well, self-service can still be transformative. Customers value speed, independence, and the ability to complete tasks without waiting for support.

The key is balance. Automation should simplify, not shift complexity onto the users.

Several principles help achieve this balance:

1. **Clarity.** Every interaction should have a clear purpose and an expected outcome. Ambiguity drives frustration faster than delay.

2. **Context.** Systems should recognize who the customer is and where they are in their journey. Prefilled forms, personalized help options, and consistent data across channels reduce repetition.

3. **Connection.** When digital tools fail, escalation to human assistance should be seamless. Contact information and live chat should appear within reach, not hidden behind multiple layers.

4. **Feedback.** Users need visible confirmation that their effort produces results. Progress indicators, status updates, and follow-up messages create confidence that the process is working.

These principles apply equally to customer-facing *and* employee-facing systems. The design lessons that make portals intuitive for customers also improve the technology experience for agents. When internal tools are as thoughtful as external ones, service quality rises across the board.

**AUTOMATION
SHOULD
SIMPLIFY, NOT
SHIFT
COMPLEXITY
ONTO THE
USERS.**

REDEFINING WHAT SUPPORT MEANS

The future of CX depends on how companies define support. Automation and self-service will continue to expand, but their success will depend on empathy. Customers *do not* want to work harder. They want to feel capable and respected.

Organizations that invest in usability testing, accessibility standards, and cross-functional coordination are already seeing dividends.

- Their contact centers handle fewer high-stress calls.
- Their agents report higher satisfaction.

- Their customers show greater loyalty because the experience feels effortless from start to finish.

This success hinges on a shared responsibility. CX has always been a shared effort across Marketing, IT, and Service teams. The same collaboration that fuels great campaigns must now extend to the systems customers use every day. Eliminating friction requires shared ownership of design, data, and process.

When departments align around the customer journey, each decision becomes more intentional.

- Marketing ensures messaging is consistent.
- IT ensures performance and security.
- Contact centers ensure empathy and clarity.

Together, these teams can create experiences that respect customer time and reduce emotional strain on agents.

In one sense, the question "Should your customers work for you?" is rhetorical. *They already do*, through every login, click, and submission.

The challenge is ensuring that their effort feels meaningful rather than mandatory. When companies take responsibility for simplifying that work, they strengthen every relationship that follows.

Self-service technology will always have a role to play. The goal is not to eliminate it but to make it feel natural. When people complete a task smoothly, they leave with confidence in both themselves and the brand. That is the foundation of trust, and trust is the currency of loyalty.

The promise of digital experience has never been to make customers work harder. It has always been to make life easier. The organizations that remember that simple truth will continue to earn loyalty in a world where convenience defines value.🎯



Bryan Cheung, co-founder and CMO of Liferay, is a seasoned technology leader with over 20 years of experience. His entrepreneurial vision was key to bootstrapping Liferay to nine-figures in ARR and leading the transition to as-a-service. He is a UC Berkeley alumnus who believes in using business to contribute value.



ILLUSTRATION PROVIDED BY ADOBE IMAGES

WHY CX INCREASINGLY REQUIRES OUTBOUND

HOW BEST TO PROVIDE IT.

The enterprise customer experience (CX) software world is changing. A quiet but intense battle has been unfolding for decades in the enterprise CX/contact center industry. At its core lies a fundamental question: Who owns the agent desktop?

For years, telephony vendors—and later contact center-as-a-service (CCaaS) providers—argued that the center of the agent experience is the voice interaction itself.

According to this perspective, every other digital channel should ultimately converge around the moments when a customer speaks directly with an agent.

If a customer emails a company and later calls about the same issue, the experience is clearly poor if the call reaches a different agent who cannot see the email context or who provides a conflicting answer.

CRM vendors, however, have long taken a different stance. Their arguments have been that the real problem isn't voice or channels: it's data fragmentation.

In large enterprises, customer information often exists in dozens of systems. Records are duplicated, incomplete, or outdated. Consequently, agents spend large portions of their conversations searching for the right information across multiple tools.

From this perspective, the key to efficiency is not optimizing voice interactions, but creating a single source of truth: a clean, centralized customer record that eliminates the friction caused by fragmented data.



TODAY'S LANDSCAPE

Fast forward to 2026, and the landscape looks very different.

If software was once said to be “eating the world,” today AI is increasingly eating the software world itself.

Companies are starting to question why they should pay millions in software-as-a-service (SaaS) seat subscriptions for functionality that can increasingly be assembled or automated using AI-driven development tools.

Recent moves by major vendors illustrate how much the boundaries between systems are blurring. For example, Salesforce recently introduced Agentforce Contact Center, a platform that effectively merges CRM and contact center functionality.

When a CRM vendor of its prominence starts expanding directly into CCaaS territory, it is a clear signal that the traditional divisions between systems are breaking down. At the same time, the priorities of CX organizations themselves are changing, as I will discuss next.

THE SHIFT FROM INBOUND TO OUTBOUND

Beyond the technological shifts occurring in the vendor landscape, there is another major transformation underway: the move from inbound reactive service to proactive engagement.

This shift goes by many names. Some describe it as moving from inbound to outbound. Others refer to it as proactive service, lifecycle engagement, or customer health management.

Regardless of the terminology, the core idea is the same. Instead of waiting for customers to contact you when they have a problem, businesses increasingly need to reach out to customers first.

That outreach might take the form of a phone call. It might also be a text message, a reminder, or a proactive in-app service notification. But the principle is the same. Businesses must take initiative if they want to maintain strong customer relationships.

This is not happening simply because organizations have suddenly decided it's the right thing to do. It's happening because market dynamics and customer expectations demand it.

COMPETING AGAINST CUSTOMERS' EXPERIENCES

One of the biggest misconceptions among CX leaders is misunderstanding who they are actually competing with. Yes, if you sell cereal, jewelry, insurance, or enterprise software, your direct competitors are other companies selling those same products.

But when it comes to CX, the comparison set is far broader.

Customers don't compare their experiences with your company solely against your industry peers. Instead, they compare them against the best experiences they have ever had anywhere.

- The convenience of overnight shipping.
- The concierge who handled everything perfectly at a boutique hotel.
- The legendary returns policy of Zappos.

- The hyper-personalized advice of a great coach or consultant.

Those experiences shape expectations across every industry.

For large organizations operating at scale—with complex processes, legacy systems, and layers of bureaucracy—competing with those experiences can feel almost impossible.

**...THE MOVE FROM INBOUND
REACTIVE SERVICE TO
PROACTIVE ENGAGEMENT...
BECAUSE MARKET DYNAMICS
AND CUSTOMER EXPECTATIONS
DEMAND IT.**

But one simple action can go a long way, and that's proactively reaching out to customers:

- A quick check-in about a subscription.
- A call informing a customer about a new package that might better suit their needs.
- A notification that their account balance is running low.

These gestures demonstrate that the business is paying attention and is actively invested in the relationship.

Proactive engagement is not a new concept. Over the past 15 years, digital-first CX platforms have introduced many tools to automate these interactions through email, (social) messaging, and in-app notifications.

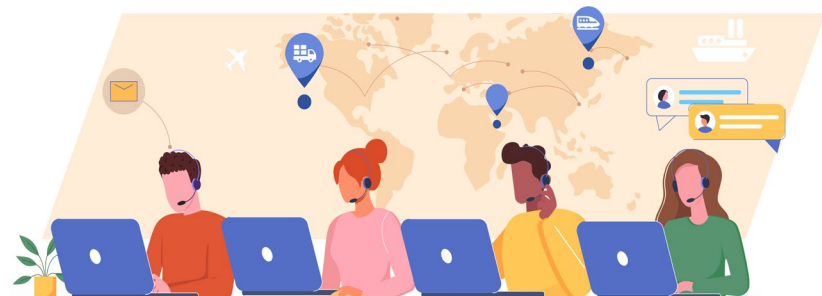
Yet despite all these digital channels, the phone remains a powerful medium. At least for the foreseeable future, many situations will still require a human conversation. And of course, nearly everyone has a phone with them wherever they go.

The challenge is that most CX organizations are *not* well equipped to run outbound engagement programs. To do so effectively, they may need to borrow lessons from an industry that has long specialized in this area: telemarketing.

READING THE TELEMARKETING PLAYBOOK

The term “telemarketing” often carries negative connotations. For many people, it evokes images of spam calls or fraudulent schemes.

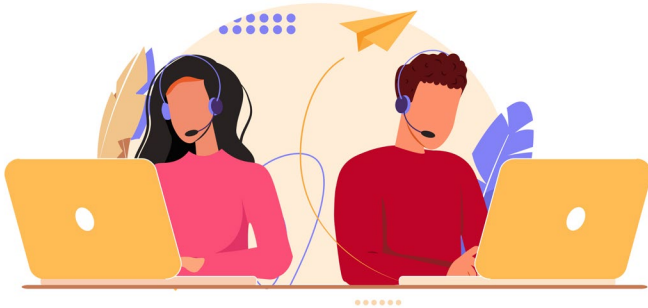
Yet the reality is more nuanced. Many legitimate businesses rely on outbound calling because their customers actively want those conversations.



Millions of U.S. consumers, for example, are researching major purchases every day: new roofs, mortgage refinancing, insurance policies, solar installations, and other significant financial decisions.

These consumers often don't have time to call multiple businesses themselves and wait in IVR queues. Instead, they welcome outreach from companies offering relevant solutions.

The companies that succeed in these high-velocity outbound sales environments have developed sophisticated operational capabilities. These are capabilities that modern CX teams can learn from, as I will discuss later.



THE OPERATIONAL CHALLENGES OF OUTBOUND

However, running an outbound contact center comes with several persistent challenges.

1 NUMBER FLAGGING

The first challenge is simply reaching customers in the first place.

Contact rates—the percentage of outgoing calls that lead to a live conversation—can range anywhere from less than 1% to roughly 15%, based on our two decades of experience.

Consumers are busy. They are in meetings, commuting, picking up their kids, or otherwise unable to answer the phone (law enforcement really doesn't like drivers picking up their phones either).

On top of that, major carriers such as AT&T, Verizon, and T-Mobile have implemented aggressive spam detection systems. Many outbound calls are automatically labeled as "Spam Likely" or "Scam Likely."

While these systems successfully block many fraudulent calls, they also impact legitimate businesses trying to reach their customers. When a call is flagged this way, very few recipients will answer. The result is a dramatically reduced contact rate.

2 IDLE AGENTS

Low contact rates create another operational challenge: idle agents.

Imagine an agent manually dialing phone numbers one at a time. With the very low contact rates noted previously, they spend most of their time listening to ringing tones or voice-mail greetings.

Few things destroy productivity faster than agents waiting for calls to connect with a human.

3 COMPLIANCE COMPLEXITY

Outbound calling and texting are also subject to extensive regulatory oversight:

- The primary governing laws and regulations in the U.S. are the FCC's Telemarketing Consumer Protection Act (TCPA) and the FTC's Telemarketing Sales Rule (TSR).
- Many states impose their own—and often stricter—calling restrictions, including permitted call windows, allowable calls per day, and additional consent requirements.
- Outbound teams must also scrub their calling lists against the National Do Not Call (DNC) Registry as well as various state registries.

Another complication is phone number reassignment for calls and texts. Over 35 million phone numbers change owners every year, according to FCC data that we've received. The FCC requires organizations to check their lists against the federal reassigned numbers database.

For companies trying to proactively engage customers while remaining compliant, the complexity can be daunting.

4 FRAGMENTED DATA

Finally, many outbound operations suffer from the same problem that has long plagued enterprise CX: fragmented data systems.

Agents often need to navigate multiple applications while speaking with a customer: CRM systems, billing tools, marketing platforms, and internal knowledge bases. In some environments, agents literally work across multiple monitors just to gather the information required for the conversations.

But when agents are focused on navigating systems instead of listening to the customers, the quality of the interaction inevitably suffers.

HOW BEST-IN-CLASS OUTBOUND TEAMS OPERATE

Organizations that run large outbound operations successfully have developed solutions to these challenges.

1 INTELLIGENT NUMBER MANAGEMENT

At first glance, placing outbound calls might seem straightforward: simply dial a number and wait for someone to answer.

In practice, it is far more complicated.

Carriers rely on constantly evolving algorithms to determine whether numbers should be flagged as spam. These algorithms are essentially black boxes; no one outside the carriers fully understands the exact logic.

To maintain high contact rates, outbound teams must carefully manage large pools of phone numbers across different geographic areas. They must continuously monitor which ones remain "healthy" and which have been flagged.

This requires sophisticated number management systems that dynamically assign healthy numbers and rest unhealthy numbers (pausing the usage of flagged numbers) for a period of time to maintain deliverability.

The past practice of frequently replacing flagged numbers with newly bought numbers is counterproductive and might even put your business at risk.

2 PREDICTIVE DIALING AT SCALE

Because contact rates are so low, outbound operations rely heavily on predictive dialing technology.

Predictive dialers automatically call multiple phone numbers simultaneously and connect calls to available agents only when a human answers. This ensures that agents spend most of their time speaking with customers rather than waiting for calls to connect.

While this can be relatively easy to implement with small teams of 10 or 20 agents, it becomes significantly more complex when managing hundreds of agents and many campaigns.

While specialized outbound sales call centers operating at scale may have access to state-of-the-art technologies, *the reality is that the aforementioned CX contact centers looking to shift to outbound are running on CCaaS platforms that were simply not built for outbound.*

These platforms offer preview dialing, power dialing, and, in some cases, even predictive dialing functionality that simply lacks the power to ensure performance.

3 CAMPAIGN WORKFLOW AUTOMATION

Successful outbound engagement requires more than a single call attempt. Reaching a customer often requires a structured sequence of outreach attempts across multiple channels.

This is why outbound teams think in terms of campaigns rather than individual calls. A campaign is a coordinated series of actions designed to achieve a specific objective. Outbound engagement campaigns involve a sequence of calls, messages, and follow-ups designed to reach the desired outcomes.

Modern outbound platforms provide automation tools that manage these workflows, ensuring that each contact follows the appropriate engagement sequence.

4 BUILT-IN COMPLIANCE GUARDRAILS

Given the regulatory complexity surrounding outbound communication, compliance *cannot* be an afterthought.

Organizations must implement systems that automatically enforce compliance rules: such as call time restrictions, consent management, and DNC list scrubbing.

Because the TCPA allows private lawsuits, violations often result in class-action litigation. Beyond financial penalties, the reputational damage to a company's brand can be significant. Robust compliance guardrails, therefore, become essential for any organization operating at scale.

CUSTOMERS OFTEN APPRECIATE LEARNING ABOUT SOLUTIONS THEY WERE NOT AWARE OF OR DISCOVERING PRODUCTS THAT BETTER FIT THEIR SITUATIONS.

THE HUMAN CHALLENGE

There is also a more subtle challenge in the shift toward proactive engagement: people.

Many contact center agents have spent years focused purely on customer service. Their role has traditionally been to solve problems, answer questions, and assist customers.

As organizations move toward outbound engagement and revenue generation, these agents are increasingly asked to adopt a more commercial mindset.

This can be uncomfortable. The image of a friendly service representative helping a customer solve a problem feels positive and familiar. The image of a pushy salesperson can feel far less appealing.

But the reality is more nuanced. At its core, selling is simply helping customers solve problems by connecting them with products or services that meet their needs.

When done correctly, proactive engagement and thoughtful sales conversations can actually *improve* the CX. Customers often appreciate learning about solutions they were not aware of or discovering products that better fit their situations.

To help agents with this transformation, contact center leaders should invest in two areas.

First, there will be agents for which this sales mindset will come more naturally than others. Leverage these resources as examples and coaches. Agents will learn better from peers they work with daily and respect.

Secondly, I would recommend investing in the many AI-driven QA and coaching technologies available. These AI tools allow for previously unseen levels of coverage and real-time feedback loops.

The role of the customer service agent is evolving. And so are the expectations placed on CX organizations.

The future of customer CX will increasingly require organizations to blend service, proactive engagement, and revenue generation in ways that were previously separated.

And that future will almost certainly involve picking up the phone. 



Daniel Foppen, VP, Product Marketing, Convoso, brings over 20 years of product and product marketing experience in the CX industry, leading teams in go-to-market (GTM) strategy, messaging and positioning, global sales and partner enablement programs, thought leadership, and impactful storytelling. His diverse, international background spans start-ups to enterprise environments.



ILLUSTRATION PROVIDED BY ADOBE STOCK

THE CX EXECUTION CRISIS

AI WITHOUT IMPLEMENTATION ABILITY IS THE NEW THREAT.

We're witnessing something unprecedented in customer support (CS) and customer experience (CX) Operations: a widening gap between what organizations say they want and what they can actually deliver.

Our recently published research, surveying these functions' decision-makers across multiple industries between October and November 2025, reveals a market approaching an inflection point.

The data tells a story of strategic clarity colliding with operational reality, and the consequences of this collision will reshape how we think about build-

ing versus partnering for CX excellence. It points to gaps in AI implementation, and also in measurement, support, and global capability.

THE WORRYING NUMBERS

Let me share the statistics that stopped me in my tracks: 75.7% of organizations prioritize AI and automation investments in the next 12 months. That's three-quarters of the market moving in the same direction (also **see FIGURE 1**).

But here's where it gets interesting. 48.6% simultaneously struggle with agentic AI implementation, and 64.9% face limited budgets and resources.

ORGANIZATIONS ARE COMMITTING TO STRATEGIES THEIR OPERATING MODELS ARE STRUCTURALLY UNABLE TO DELIVER.

Read those numbers again. Nearly half the organizations racing toward AI lack the capability to implement it. Two-thirds are trying to do so with inadequate resources. The result is **an AI implementation gap**.

This isn't a technology problem. Instead, it's an execution crisis.

I've spent years building organizations that deliver CX excellence at scale. What this data reveals is that AI investment is increasingly being mistaken for AI progress. Organizations are committing to strategies their operating models are structurally unable to deliver.

UNDERSTANDING THE AI GAP

Our research identifies two distinct cohorts emerging: *AI-Capable organizations* (51.4%) and *AI-Aspirational organizations* (48.6%). The difference between these groups isn't budget size or strategic vision; it's execution infrastructure.

AI-Capable organizations have moved beyond AI ambition into repeatable deployment. They still face complexity, but they have:

- Technical infrastructure and data foundations that support automation at scale (clean data, integrated knowledge, and operational analytics).

- Internal AI expertise and delivery capacity (dedicated owners, implementation resources, and governance to ship and iterate).
- Change management and adoption frameworks that drive agent and customer uptake (training, playbooks, and performance reinforcement).
- Integration capabilities across the existing technology stack so AI can operate end-to-end (CRM, ticketing, WFM, QA, and reporting).

These organizations tend to treat AI as an operating model upgrade: measuring time-to-value, redesigning workflows, and building feedback loops to improve outcomes over time.

AI-Aspirational organizations demonstrate consensus on AI's strategic importance. They've allocated a budget. They've made commitments. But they lack:

- The technical infrastructure and data foundations necessary for implementation; 35.1% struggle with digitalization and advanced analytics.
- Internal expertise and implementation resources.



- Change management and adoption frameworks.
- Integration capabilities with existing technology stacks.

These organizations face a critical decision: build internal capabilities (requiring 18-24 months and significant investment) or access capabilities through strategic partnerships. Given that nearly 65% already face resource constraints, the math on internal builds becomes increasingly challenging.

Taken together, these two cohorts define the AI implementation gap: nearly everyone agrees AI is the next lever for efficiency and experience. But only about half have the infrastructure, talent, and operating discipline to turn spend into measurable impact.

For AI-Aspirational teams, the risk is obvious; AI becomes a line item without ROI. For AI-Capable teams, the risk is different: the bar rises quickly, and sustaining investment depends on proving value continuously.

THE MEASUREMENT GAP

Our survey reveals a fundamental shift in how organizations conceptualize CS and CX Operations value. Revenue impact and customer retention are now tied as the top CX priority, each at 29.7%, while traditional metrics like CSAT (16.2%) and NPS (10.8%) are being deprioritized.

This represents CS and CX Operations function maturation. Organizations increasingly view support as revenue drivers, retention mechanisms, and as growth catalysts: not just as cost centers.

The problem? 35.1% have difficulty measuring impact on business results, and 24.3% struggle to justify investments to C-suite executives.

Organizations have achieved strategic clarity; they understand revenue metrics matter but they lack the frameworks, data infrastructure, and analytical capabilities to measure effectively.



FIGURE 1

SOURCE: WOW24-7

CS AND CX OPERATIONS LEADERS WHO ARE UNABLE TO DEMONSTRATE REVENUE IMPACTS WILL SEE THEIR BUDGET ALLOCATIONS DECLINE BY 15%-20% ACCORDING TO OUR PROJECTIONS.

This measurement gap undermines investment justification efforts and resource acquisition, creating a self-reinforcing constraint cycle.

CS and CX Operations leaders who are unable to demonstrate revenue impacts will see their budget allocations decline by 15%-20% according to our projections.

This reduction in financing, but also in prestige and internal organization respect, will accelerate the talent exodus, which I will discuss next; 21.6% *already* perceive their departments' functions as cost centers despite this strategic shift.

THE SUPPORT GAP

The data on organizational support reveals a leadership crisis in CS and CX Operations functions. Only 18.9% of CS and CX leaders feel highly supported by their organizations, while 56.8% struggle to secure resources. The average organizational support score is just 3.7 out of 5.

Despite the rhetorical elevation of CX's importance, leaders report insufficient resources. 64.9% face organizational resource constraints, measurement and credibility challenges, and limited strategic integration.

This tells us that most organizations operate in environments that expect high performance but provide low institutional support for their employees.

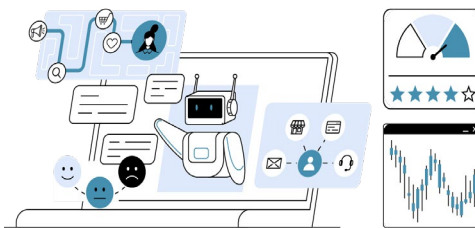
This support gap creates critical mid/senior-level management retention risks, which, in turn, could result in lowered CX and higher frontline, including contact center agent performance, burnout, and turnover.

Simply put, high-pressure environments with inadequate support drive burnout. Organizations risk losing CX leadership talent to:

- Competitors offering better support and resources.
- Consulting firms seeking practitioners with real-world experience.
- Technology vendors building customer success functions.

Our research identifies four organizational maturity segments: Champions (18.9% highly supported), Progressives (37.8% well supported), Traditionalists (29.7% moderately supported), and Laggards (13.5% poorly supported).

There is an upside in our data. The concentration of organizations in the middle segments suggests significant opportunity for differentiation through CX investment.



THE GLOBAL CAPABILITY GAP

Our research reveals persistent operational deficits that have real competitive consequences. 32.4% of organizations lack 24/7 coverage and 18.9% lack multilingual support capabilities, **even as businesses expand digital channels and global customer reach**.

The alignment between these capability gaps and outsourcing priorities is striking: 32.4% cite 24/7 coverage as an important outsourcing factor and 29.7% cite multilingual support.

For organizations that prioritize revenue impact and customer retention, these capability gaps directly undermine strategic objectives.

EVEN TECH COMPANIES ARE STRUGGLING

Perhaps the most surprising finding from our survey of customer support and CX is that technology-forward industries don't naturally excel at CX modernization.

Technology, including software-as-a-service (SaaS) companies, represented 37.8% of our survey respondents, yet 32.4% still lack 24/7 coverage and 35.1% struggle with digitalization and analytics gaps.

These data points contradict conventional assumptions. ***Technical sophistication doesn't equal CX operations maturity.***

Technology companies possess strong product development capabilities, sophisticated engineering talent, and advanced technology stacks, but these advantages don't automatically translate to CX excellence.

CX operations require distinct capabilities: human-centric design thinking, operational excellence in service delivery, cross-functional coordination, and customer insight translation into action.

If the technology sector, with natural advantages in data infrastructure, technical talent, and digital maturity, struggles with CX modernization, organizations in traditional industries face even greater challenges.

The implication is clear. CX transformation difficulty transcends industry. Dedicated CX expertise and focus matter more than general technical sophistication. Consequently, organizations may achieve better outcomes by accessing specialized capabilities externally versus building internally.



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But organizations that recognize these deficits, and understand external partnerships, may be able to address them more effectively than those that are building them internally.

Digital channels create 24/7 access expectations while geographic expansion requires multilingual support. Competitors with these capabilities capture demand while organizations without them experience revenue leakage.

THE IN-HOUSE PARADOX

Perhaps the most revealing finding from our CS and CX Operations survey is what I call the "In-House Paradox."

75.7% of organizations maintain fully in-house support teams, yet the average satisfaction with current setups is just 7.0 out of 10. Only 40.5% rate their model as high performing (scores of 9-10).

Think about what this means: organizations are tolerating mediocre performance rather than pursuing alternative operational models.

A 7.0 satisfaction score signals that most in-house teams are delivering "good enough," not excellence. In a competitive landscape where CX increasingly determines market winners and losers, **"good enough" is a strategic liability.**

Why do organizations cling to in-house models? Several factors drive this paradox.

- There's concern about brand representation and customer relationship ownership.
- There are previous experiences with legacy BPO models and the call center nightmares of decades past.

Influenced by the legacy model's most visible failure modes: cost-driven staffing, inconsistent training, script dependency, fragmented systems, and "ticket ping-pong" that made customers repeat themselves and stretched simple issues into multi-contact journeys.

- And there's a belief that CS and CX Operations represent core competitive differentiation requiring internal ownership.

The last point deserves scrutiny. If customer support is truly a competitive differentiator, why accept mediocre outcomes? Organizations are clinging to in-house models not because they work well, but because switching feels riskier than tolerating underperformance. **That calculus is about to change.**

SUCCESS DEPENDS ON HONEST CAPABILITY ASSESSMENT, STRATEGIC PRIORITIZATION, AND A WILLINGNESS TO ACCESS EXTERNAL EXPERTISE...

THE PATH FORWARD

The data reveals no single path to CX excellence. Success depends on honest capability assessment, strategic prioritization, and a willingness to access external expertise where internal builds prove impractical.

Organizations that embrace hybrid models, combining internal strategic ownership with external capability access, will achieve superior outcomes compared to purely internal or fully outsourced approaches.

The key is moving beyond the In-House Paradox: the preference for internal control despite mediocre outcomes.

For CS and CX leaders, the imperative is clear.

First, audit your AI implementation capability honestly. If you're in the 48.6% struggling with agentic AI implementation, acknowledge that reality rather than hope your way through it.

Second, quantify your measurement gaps. If you can't demonstrate revenue impact, you can't justify investment, and you can't break the resource constraint cycle.

CUSTOMER EXPERIENCE

Third, evaluate hybrid models seriously. The BPO industry has evolved dramatically from the offshore call center nightmares of the past. Modern partnerships can feel like extensions of internal teams while delivering capabilities that would take years to build.

Fourth, advocate for organizational support elevation. The current support deficit (3.7/5 average) undermines execution and creates talent retention risks. CS and CX Operations leaders must make the case for strategic integration, not just operational resources.

THE 2026 INFLECTION POINT

We project that sometime this year (2026), 70% of organizations maintaining fully in-house CS and CX Operations will face critical scaling challenges due to AI capability gaps and resource constraints, forcing strategic decisions about build-versus-partner models.

Organizations that fail to resolve the AI implementation gap will also experience 25%-30% higher customer acquisition costs compared to competitors with mature AI-enabled operations.

The convergence of AI capability requirements, resource constraints, and evolving success metrics creates both risk and opportunity.

Organizations must resolve the fundamental tension between AI ambition and implementation capability, closing that gap, while simultaneously addressing operational gaps in measurement, support, and global capabilities and their frameworks.

The organizations that bridge these gaps, whether through internal builds, strategic partnerships, or hybrid models, will transform CS and CX Operations from operational necessities to competitive advantages.

But those that don't will find themselves on the wrong side of an increasingly unforgiving market.

The data is clear. The clock is ticking. The question for every CX Operations leader is simple: which cohort will you be in? 🕒



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THE U.S. – CANADA COMPLIANCE GAP

WHY IT IS A RISK FOR CONTACT CENTERS.

Email sits at the center of customer service in Canada. Renewal notices, account updates, service alerts, appointments, and payment reminders all depend on it.

Email also drives broader customer interaction across contact centers, including calls, chat sessions, web self-service, and in-person visits and appointments.

When email fails, everything slows down. Contact centers feel it first because they rely on steady communication to resolve issues and keep customers informed.

Over the last few years, there has been a clear shift. Canadian organizations are paying closer attention to the

privacy and governance structures behind the tools they use.

In contrast, many U.S. organizations have historically prioritized scale, cost efficiency, and feature expansion, with privacy and governance often addressed after deployment.

As a result of organizations on both sides of the border moving apart, a growing compliance gap has opened between Canadian expectations and how many U.S.-owned email platforms operate. This gap also applies to other communication channels such as voice, chat, and customer data platforms.

That gap shapes vendor selection, trust, data handling, and inbox perfor-

mance. It has become a common theme in procurement conversations across government, public institutions, and regulated sectors.



**THAT GAP SHAPES
VENDOR
SELECTION,
TRUST, DATA
HANDLING, AND
INBOX
PERFORMANCE.**



DATA RESIDENCY VERSUS DATA CONTROL

The root issue is simple: *data residency is not the same as data control.*

Data residency refers to where data is physically stored. Data control refers to which legal jurisdiction has authority over that data, including the ability to access or compel disclosure.

If a platform is governed by U.S. law, Canadian data can be subject to it even if the servers sit in Canada. But many Canadian public bodies will *not* accept that risk. More private Canadian organizations are now reaching the same conclusion. They want predictable rules and local oversight.

This reality influences how leaders think about the systems that support their email communications. It also affects how they evaluate systems that support voice, chat, and broader customer interaction channels.

WHY CANADIANS EXPECT CANADIAN CONTROL

Canada's privacy framework puts consent, accountability, and transparency at the center of how personal information is handled. Organizations must explain why they collect data, how long it will stay in the system, how it is used, and who can access it.

Several laws (and a proposed law) reinforce these expectations:

- The Personal Information Protection and Electronic Documents Act (PIPEDA), which sets private-sector standards across Canada.
- Bill C-27, which aimed to overhaul Canada's federal private-sector privacy framework, did not pass before the last parliamentary session ended but is widely expected to return in a revised form.

If that happens, it would strengthen individual rights, increase accountability obligations, and introduce stricter governance expectations, further raising the compliance bar for Canadian organizations and the platforms they rely on.

- Quebec's Law 25, which requires explicit consent, privacy impact assessments, and strict retention rules.
- Canada's Anti-Spam Legislation (CASL), which governs consent, opt-outs, and digital communication practices.
- Provincial sector regulations, such as British Columbia's and Nova Scotia's public sector data-hosting rules and Ontario's strict health privacy requirements, add further requirements in the health, education, and the public sectors.



Canadian organizations operate under these rules every day. They expect the tools they use, especially email platforms, to match those standards. But when a platform is owned outside Canada, alignment becomes difficult. Jurisdiction follows the company, not the physical server.

This is why U.S. ownership is now treated by Canadians as a core risk.

HOW U.S. LAWS WIDEN THE COMPLIANCE GAP

U.S. privacy laws rely on different assumptions. The Patriot Act and Cloud Act give broad access rights to U.S. authorities, including rights over data stored in other countries – regardless of the channel used to collect or process that data – if the provider is American-owned.



OTHER LAWS SHAPING COMMUNICATION EXPECTATIONS

Data and privacy laws are central, but Canadian and Canadian customer-serving organizations must consider other regulations that influence how they communicate.

- Quebec's language laws, such as Bill 96, require French-first messaging and affect how templates and workflows are designed.
- Telemarketing and contact rules under the Canadian Radio-television and Telecommunications Commission (CRTC) shape how contact centers manage outreach and consent.
- Payments and financial-communication regulations require secure processes for reminders, statements, and confirmations.
- Labor-relations laws influence training, reporting structures, and accountability for teams handling personal data.
- Interprovincial trade barriers still affect which vendors qualify for certain public contracts, especially when data must remain in a specific province.

These areas point toward the same expectation: *Canadian organizations need - and insist on - consistency and clear governance in the tools they use.*

BOX

On the other side, General Data Protection Regulation (GDPR) in the European Union member states and Law 25 in Quebec require strict consent rules, data minimization, and predictable governance. Many Canadian organizations expect similar protection.

This difference creates friction during vendor evaluations and onboarding. It also adds pressure on contact centers that must show full compliance to their clients and regulators.

This is not theoretical; it affects daily operations.

The compliance gap shows up in several tangible ways.

1. Vendor reviews take longer. Data ownership and foreign access exposure must be evaluated.
2. Authentication expectations rise. Sender Policy Frameworks (SPF), DomainKeys Identified Mail (DKIM), and Domain-based Message Authentication, Reporting, and Conformance (DMARC) must be configured correctly to prevent spoofing and protect customers.
3. Consent handling must match CASL. Weak record-keeping or unclear unsubscribe paths are not acceptable.
4. Procurement cycles expand. Public institutions need documentation for governance, impact assessments, and incident response.
5. Inbox placement becomes part of compliance. Gmail, Yahoo, and AI-driven filters use trust signals to determine visibility.



...LEADERS WHO APPROACH PRIVACY AS OPERATIONAL INFRASTRUCTURE, NOT AS A CHECKBOX, PROTECT THEIR TEAMS AND THEIR CUSTOMERS. THEY ARE ALSO MORE LIKELY TO EARN LONG-TERM CUSTOMER TRUST AND LOYALTY...

Email is still a communication channel, but it is also a compliance environment. Decisions behind the scenes have direct operational impact.

WHY RESPONSIBLE DECISIONS SHAPE OUTCOMES

Email platforms face steady pressure to increase volume. Allowing high-risk senders may bring short-term gains, but it creates problems later. It harms domain reputation, increases complaint rates, and pushes teams into reactive support.

Strict controls can feel limiting at first, yet they protect the infrastructure over time. They reduce operational strain and create more predictable outcomes for users who depend on stable delivery. Responsible governance often pays off long after the decision is made.

POLITICAL VOLATILITY INCREASES STABILITY DEMANDS

Shifts in U.S. political direction raise questions about how privacy will be treated in the future. This is increasing demand in Canada for data control under Canadian jurisdiction and reinforcing expectations that Canadian data should be governed by Canadian laws.

Canadian organizations want stability. They prefer systems governed by Canadian law because it removes uncertainties they cannot control. This preference becomes more visible each time contracts come up for renewal.

WHAT U.S. PLATFORMS CAN DO

The future will reward organizations that treat privacy as infrastructure. U.S. platforms that want to support Canadian organizations have several practical options:

- Provide clear documentation on data governance and ownership.
- Explain how foreign access laws apply.

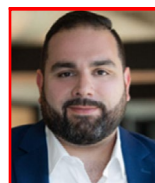
- Support CASL-compliant consent and unsubscribe workflows.
- Enforce SPF, DKIM, and DMARC by default.
- Offer retention controls and audit logs.
- Provide tools or templates for privacy impact assessments.
- Allow configuration paths that match Law 25 and PIPEDA expectations.



Canada's privacy rules, and other rules (see **BOX**), are becoming more consistent and more demanding. Misalignment between platform governance and Canadian regulatory expectations creates operational risk, compliance exposure, and potential loss of customer trust.

Those who delay the work in alignment often face avoidable issues in delivery, service reliability, and long-term trust.

But leaders who approach privacy as operational infrastructure, not as a checkbox, protect their teams and their customers. They are also more likely to earn long-term customer trust and loyalty in a market where privacy expectations continue to rise. 



With nearly 20 years of experience in the digital field, Geoffrey began his career designing and implementing eCommerce and ERP solutions. For the past three years, he has been leading Cyberimpact, an email marketing platform that is committed to helping businesses comply with Canadian laws, protect data, and ensure customer privacy.



ILLUSTRATION PROVIDED BY ADOBE IMAGES

FCC NPRMs TARGET NEAR/OFFSHORE CALL CENTERS

AGENCY, LAWMAKERS ARE ALSO AIMING AT OUTBOUND DIALING.

For years, companies - including many in the business process outsourcing (BPO) space - have relied on nearshore and offshore call center staffing to cut costs, deal with U.S. staffing shortages, and offer services around the clock.

However, a series of Federal Communications Commission (FCC) Notices of Proposed Rulemaking (NPRMs) is putting this model at risk.

These proposed regulations cover:

- Call branding ([FCC 25-76](#)), including – and notably – from outside of the U.S.
- Call center onshoring ([FCC 26-16](#)).

Both have a common thread: foreign traffic, near/offshore agents, and call centers that route U.S. campaigns through international providers, all of which are now squarely in the FCC's sights.

But these proposed changes could impose a real operational and compliance burden on not only customer service, but also on marketing campaigns and debt collection outreach efforts ([see BOX 1](#)).

The new rules, should they go into effect, likely will affect how companies and their BPO partners operate and comply with regulations.

Consequently, companies relying on near/offshore call center staffing should be ready to make necessary adjustments to avoid compliance exposure.

CALL BRANDING

The call branding FNPRM (the F stands for further), released October 29, 2025, would require incoming/outgoing calls from outside the U.S. to transmit a visible foreign-origin indicator to devices.

But this rule, if implemented, could cripple offshore call centers with near-zero answer rates for debt collection, financial services, healthcare, and lead generation.

Industry comments submitted expressed concerns over issues such as accuracy identifying the calling party, and man-in-the-middle (MITM) call hijacking.

In response, the FCC did soften some of the proposed provisions between the circulated draft of the FNPRM and the version it adopted, such as by making the labeling and spoofing rules clearer.

CALL CENTER ONSHORE

The FCC NPRM on call center onshoring and English-language proficiency (26-16), published in the Federal Register on April 23, 2026, extends the call branding FNPRM's foreign-call themes with onshoring requirements, English proficiency standards, and gateway-provider accountability.

This NPRM floats strict limits on offshore telecom call center work. A March 26, 2026 *Law360* article, "FCC Floats Cap For Offshore Telecom Call Center Work" notes the agency wants to cap foreign-staffed calls when callers struggle with U.S. English or local context. The FCC sees these limits as a national priority tied to scam prevention and service quality.

Chairman Brendan Carr's statement, released when this NPRM was adopted on March 26, 2026, frames it bluntly: offshore centers mean "confusing service, delayed support, and even security risks," with scammers learning the ropes before launching their own fraud operations.

Marketing efforts could also face heavy exposure here too: especially with lead-generation and appointment-setting campaigns. Many campaigns run through Philippines or Indian contact centers, where agents call U.S. numbers from places like Manila or Bangalore.

Debt collection sees similar risks. Offshore teams often struggle with understanding specific state laws or handling disputes properly, leaving customers frustrated and issues unresolved.

Onshoring NPRM Details

Specifically, the onshoring NPRM:

- Proposes percentage limits on the number of offshore customer service calls allowed for U.S. telecom carriers with oversight extending to their BPO vendors and contractors.

- Mandates English proficiency certification for agents handling American consumers, drawing from benchmarks like TOEFL or TOEIC to check language skills, cover tone, idioms, and cultural fit.

...THESE PROPOSED CHANGES COULD IMPOSE A REAL OPERATIONAL AND COMPLIANCE BURDEN...

RETAILERS OPPOSE PROPOSED ONSHORE RULE

The FCC's NPRM on onshoring and English-language proficiency (26-16) has elicited strong opposition from one of the largest and one of the most powerful business sectors that also relies on contact center services: retailers.

The National Retail Federation (NRF) wrote to the FCC on April 21, 2026, urging it to shelve the proposed rule.

"The caps, disclosures, and transfer requirements included in the NPRM would only harm, not help, consumers by increasing wait times and reducing service efficiency," wrote David French, Executive Vice President Government Relations.

"A mandated right to transfer to a U.S.-based representative, combined with limits on offshore handling, would likely create operational bottlenecks, longer queues, higher abandonment rates, and duplicative handling of the same customer issue.

"The Commission should be cautious about requirements that drive costs up and service levels down at a time when households remain sensitive to price increases."

The NRF also warned that the proposed rule could limit multilingual service and accessibility for non-English-speaking consumers.

"Retail serves diverse communities nationwide, and language access is a core feature of effective customer care," said French.

"Prescriptive 'American Standard English' requirements and restrictions on global staffing could reduce retailers' ability to deliver fast, accurate support for consumers who prefer languages other than English."

Critically - and this is the kicker - the NRF says the FCC's proposed regulations could result in fewer, not more, American contact center jobs by accelerating automation.

"A policy intended to preserve domestic jobs could therefore have the opposite effect by hastening transitions that reduce human roles over time," warned French.

BOX 1



- Requires start-of-call disclosures for calls routed overseas, alerting customers of their option to easily switch to a U.S.-based agent.
- Suggests strict rules barring offshore handling of sensitive info like passwords, Social Security numbers, and payments.
- Seeks comment on whether these protections should extend to emails, texts, and online chats.

Several of these proposed requirements echo the Keep Call Centers in America Act (S.2495) introduced in 2025. That bill requires location disclosure at call start and free transfers to U.S. agents.

Providers of telecom, CMRS (wireless carriers), interconnected VoIP, cable, and DBS (satellite) services - plus affiliates - also fall under the scope of this NPRM, with extensions eyed for internet access service.

- Proposed caps may limit foreign calls to 30% of volume (as an example), pushing onshoring but without completely banning foreign calls.
- Monthly, quarterly or annual reports would track foreign percentages, transfer rates, and complaints, while broadband labels disclose U.S. call usage at service signup.
- To deter scams, bonds or fees are suggested to target gateway providers carrying risky foreign traffic, layering onto Robocall Mitigation Database (RMD) filings and tracebacks.

...INBOUND FOLLOW-UPS...WOULD TRIGGER DISCLOSURES LIKE "THIS CALL IS FROM (COUNTRY). DO YOU PREFER U.S.?"

Implications for Outbound Marketing

Marketing campaigns lean heavily on offshore scale for dialing and qualification. Should the call center onshoring NPRM go into effect in its current form, BPOs serving telemarketers must now track volumes and certify compliance, risking contract losses if caps hit.

Not only that, inbound follow-ups i.e., opt-outs and billing queries, would trigger disclosures like "This call is from (country). Do you prefer U.S.?" This adds Federal Trade Commission (FTC) Telemarketing Sales Rule (TSR) and FCC Telephone Consumer Protection Act (TCPA) layers as poor clarity fuels do not call (DNC) complaints.

U.S. wages are, from our sources, two to three times higher than offshore rates and training costs pile on top: so expenses increase. While nearshoring to Mexico cuts some pain, the English proficiency rules will still apply.



REINTRODUCED TELEMARKETING BILL COULD DOOM AUTODIALERS

A bill now in front of Congress could, if it becomes law, make many more calls that are made today from autodialers illegal. It could also affect outbound dialing technologies.

The Protecting American Consumers from Robocalls Act (S.4307), reintroduced on April 15, 2026, broadens the definition of automated telephone dialing systems (ATDS) in the TCPA to include any means that dials from stored lists without human intervention.

It is difficult to understate the significance of this provision. The TCPA bans the use of autodialers, but a case decided by the U.S. Supreme Court in 2021, Facebook Inc. v. Duguid, narrowed the scope of the regulation to only those calls that are made with random or sequential number generation.

That ruling effectively eliminated most modern dialing systems from the ATDS definition as few systems now do that; as a result, cases/lawsuits on ATDS plummeted post-2021.

But this proposal in S.4307 would bring nearly all modern dialers (e.g., predictive, preview, power dialers) back under TCPA ATDS liability, as they store and autodial lists.

The bill's other provisions include:

- Small businesses would be allowed to register for the Federal DNC Registry, with protections (historically, this has been limited to consumers).
- Applies after one unwanted telemarketing call, not just to more than one in a 12-month period.

The predecessor bill, S.3991, was introduced in the 118th Congress but failed to pass before Congress adjourned in January 2025.

But with the FCC's renewed focus on restricting fraudulent calling (see main article), S.4307's backers may be hoping that this spotlight – and continued voter anger with these calls – will drive its passage.

BOX 2

The upside is better trust: telecom already sits low in American Customer Satisfaction Index (ACSI) rankings due to language gaps. Companies mixing outbound work with service calls should re-evaluate vendor lineups, leaning toward hybrid U.S. - offshore models.

Nuances for Debt Collection Outreach

Collections face the same pressures as marketing, but the Fair Debt Collection Practices Act (FDCPA) and Reg F make it tighter. Offshore agents chasing accounts often fumble with notices or disputes, drawing Consumer Financial Protection Bureau (CFPB) scrutiny alongside FCC heat.

Sensitive financial data must stay U.S.-only, aligning with Department of Justice (DOJ) rules on foreign adversaries. Meanwhile, gateway bonds (posted by gateway providers, surrendered upon exceeding a "threshold of reported unlawful robocalls") raise costs for blended dialing.

Quick U.S. transfers cut deception claims but squeeze capacity. As a result, profit margins suffer short-term, but debt resolution rates get better in the long term.

Broader Contact Center and BPO Effects

Inbound support, billing, and technical help get hit with disclosures first. Routing must handle transfers without delays to cut down on the cultural nuances/gaps that drive escalations through the roof.

BPOs - 70% of companies offshore "something" - now face reshoring pressure, bringing jobs back but at the price of jacked-up operating costs.

The NPRM allows smaller/rural providers extra time to build U.S. capacity (staffing, facilities) before the call ceilings are enforced. Meanwhile, training in *legitimate* foreign call centers (to learn scripts, consumer lingo), minimizes opportunity for fraudsters.

COMPLIANCE AND GRC SHIFTS

Governance, Risk & Compliance (GRC) teams should get into the habit of building certification logs and audit data flows as a general rule. Teams should also align consent management systems and outbound dialing workflows with the TSR and TCPA consent requirements and both federal and state DNC rules; there could also be dialing system changes (see **BOX 2**).

Additionally, compliance teams should become familiar with foreign adversary reporting requirements, increasing accountability.

The FCC's tone has been set. On April 2, 2026 the agency hit a gateway provider with a proposed \$4.5 million fine for routing scam traffic from unregistered foreign sources, echoing the Foreign Robocall Elimination Act (H.R.6152) push for gateway accountability.

..AUDIT YOUR FOREIGN CALL RELIANCE NOW... OUTBOUND WORK STAYS SOLID IF YOU BUILD COMPLIANCE-FIRST HYBRID MODELS.

MORE REGULATIONS FORTHCOMING

The FCC is not slowing down. The agency issued a release April 30, 2026 on the Know Your Customer (KYC) FNPRM (26-27). It proposes per-call penalties for originating providers that fail/skip customer verification, scaling fines to call volume and harm caused.

The proposed regulation would increase pressure on carriers to stop blocking or mislabeling valid calls. It pushes new Caller ID rules that could make contact centers spend more on compliance, exposing more foreign call traffic to labeling, blocking, and verification requirements.

CTIA's April 13, 2026, Ex Parte to the FCC staff underscores industry pushback. The wireless carriers highlight existing KYC and know-your-business (KYB) tools (e.g., branded calling ID) and urge flexibility to avoid stifling legitimate calls while chasing scammers.

Also, the FCC approved an FNPRM with enhanced know-your-upstream-provider (KYUP) STIR/SHAKEN requirements for voice providers. [It aims] to combat illegal robocalls, deter number spoofing, provide better information for call blocking and call labeling decisioning, and close implementation loopholes.

INDUSTRY PATH FORWARD

The bottom line from these proposed rules is that they are designed to bring more customer service work back to the U.S. and improve accountability and service quality.

The final rules are still subject to change, and comments filed after Federal Register publication will help shape the FCC's ultimate approach.

So, audit your foreign call reliance *now*. Model call volume ceilings and run pilot tests. Outbound work stays solid if you build compliance-first hybrid models.



Melody Morehouse, MBA directs Regulatory Compliance at Gryphon AI, driving federal & state regulatory intelligence including TCPA/TSR/FDCPA/CAN-SPAM, plus contact strategy. With deep expertise in telecommunications, consumer privacy, and marketing, she turns complex regulations into practical controls for compliant outbound reach.



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