

Contact Center Pipeline

REAL ANSWERS FOR REAL CX QUESTIONS

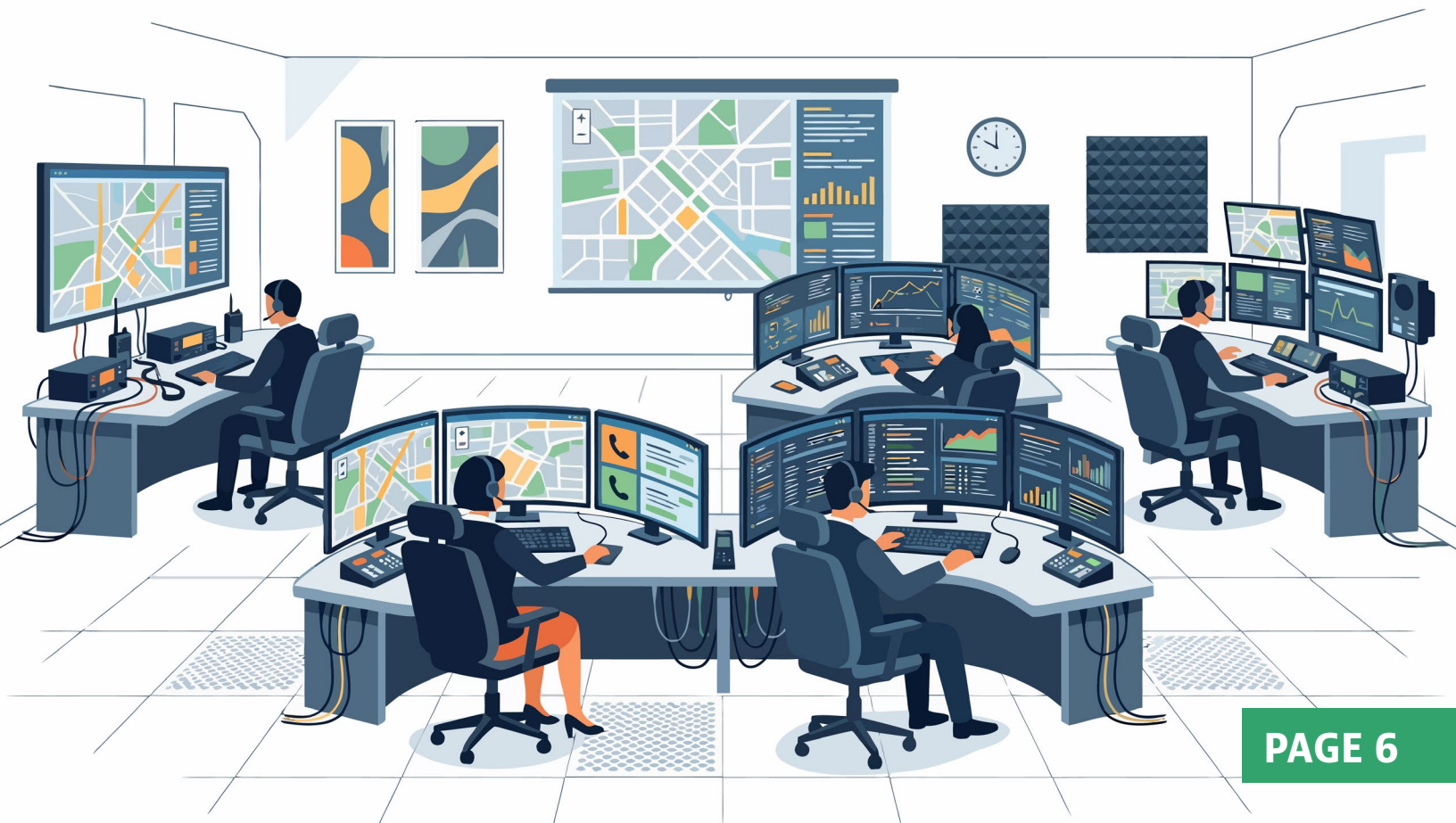
INSIDE THE ISSUE...

- 12 **ARTIFICIAL INTELLIGENCE**
THE FUTURE OF CX
- 16 **BACK OFFICE WFM**
MANAGING THE BACK OFFICE WORKFORCE
- 20 **WORKLOAD MANAGEMENT**
THE HIDDEN COST OF THOUGHTLOAD

HOW 9/11 CHANGED CONTACT CENTERS

THE ATTACKS INCREASED BUSINESS CONTINUITY, CONNECTIVITY, REMOTE WORK, AND SECURITY.

BY BRENDAN READ, CONTACT CENTER PIPELINE; Q&A WITH ADVISORY BOARD



PAGE 6

ILLUSTRATION PROVIDED BY ADOBE IMAGES

WORKFORCE PLANNING
PLANNING FOR CHAOS? - PAGE 28

FULFILLMENT CX
HOW TO PREPARE FOR HOLIDAY FULFILLMENT
CHALLENGES NOW - PAGE 30

APPOINTMENT SCHEDULING
WHY HAVE A CALENDAR-FIRST APPOINTMENT
PLATFORM? - PAGE 35

THE TOP 5 BLOG POSTS ON BLOG.CONTACTCENTERPIPELINE.COM

EXCLUSIVE CONTENT FROM OUR TEAM OF CALL CENTER EXPERTS
NEW POSTS EVERY WEEK (TUESDAY - THURSDAY)

Evolving Threats, Evolving Responses

Q&A WITH LOU CORBEIL

<https://bit.ly/4gQor0o>



How to Make Contact Centers Smarter

BY ROBERT WAKEFIELD-CARL

<https://bit.ly/4gto4aW>



CCP BLOG'S
TOP 5
MOST POPULAR
POSTS FROM
AUGUST



How to Make Remote Work Actually Work

BY MICHELA LOMBARDI

<https://bit.ly/4ghdWTO>



QA Through the Agents' Eyes

BY MARK PEREIRA

<https://bit.ly/4xlicaU>



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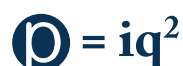
@ccpipeline

Why Screening Harder Won't Win - Part 1

BY APRIL CANTWELL

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.

<https://bit.ly/3UAH8MV>



SMART INSIGHTS AND PRACTICAL ADVICE FOR THE CONTACT CENTER

blog.contactcenterpipeline.com

THOUGHT YOU SHOULD KNOW

A MONTHLY DOSE OF FACTS & FIGURES FROM INSIDE THE ISSUE



77%

A recent study shows that 77% of agents now report increased and more complex workloads compared to just one year ago, and 56% say they've experienced burnout, which is a strong indicator that they may leave their jobs.

SOURCE
WORKLOAD MANAGEMENT:
THE HIDDEN COST OF
THUGHTLOAD
By Dr. Liane Davey
[#WORKLOADMANAGEMENT](#)

87%

At the same time, even with AI automating routine tasks, 87% of contact centers still plan to hire or backfill roles.

SOURCE
MANAGING THE
WORKFORCE:
DO AGENTS HAVE THE
NEEDED SKILLS AND
TRAINING?
By Brendan Read; Q&A
with Dina Vance
[#MANAGINGTHEWORKFORCE](#)



10

Even a modest staffing buffer can create significant financial drag. A 5% overage in a 200-agent contact center adds the equivalent of 10 additional full-time roles.

SOURCE
WORKFORCE PLANNING:
PLANNING FOR CHAOS?
By Nathan Stearns
[#WORKFORCEPLANNING](#)

22%

Transparency is also essential, with 69% of respondents saying that brands should always reveal when AI is being used. Only 22% said that companies clearly disclosed it.

SOURCE
FULFILLMENT CX:
HOW TO PREPARE FOR
HOLIDAY FULFILLMENT
CHALLENGES NOW

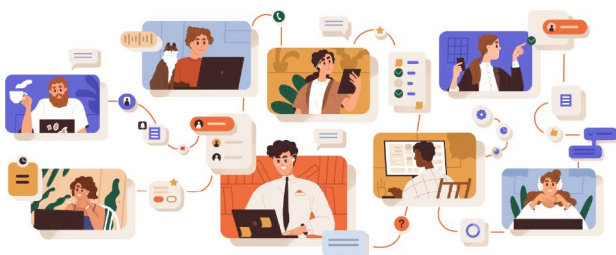
By Molly Moore
[#FULFILLMENTCX](#)

45%

Our survey found that 55% of shoppers escalated an AI-assisted interaction to a human agent. But nearly half (45%) said AI failed to understand their problem while 54% believed people ultimately delivered better service.

SOURCE
FULFILLMENT CX:
HOW TO PREPARE FOR
HOLIDAY FULFILLMENT
CHALLENGES NOW

By Molly Moore
[#FULFILLMENTCX](#)



ILLUSTRATIONS PROVIDED BY ADOBE IMAGES

FROM THE PIPELINE

Summer 2026 is now in our rearview mirror. Vacations have ended, the relaxed summertime schedule is over, school supplies are in the backpacks, and the car is loaded to take our kids off to college. So, what does all that mean?

It is time to get "Back to It."

Maybe it's that sense of going back to school that sticks with us. I think September is a great time to set new goals and get "Back to It" after a refreshing vacation, recharging our batteries, and absorbing what we learned from our summer.

This month, we explore some strategies for pressing issues. As we mark the 25th anniversary of 9/11, we look at lessons learned that have carried forward to today. We also have lots of great workforce management discussions this month, as well as AI, CX, and training. We couldn't publish an issue without exploring these topics, right?

Have a great month as you get "Back to It." Enjoy our September issue.

Linda Harden



LINDA HARDEN
Publisher
Contact Center Pipeline

MANAGING THE WORKFORCE

BY BRENDAN READ; Q&A WITH DINA VANCE



PAGE 22

DO AGENTS HAVE THE NEEDED SKILLS AND TRAINING?

CUSTOMER EXPECTATIONS AND AI ARE CHANGING REQUIREMENTS.

CX TRANSFORMATION

BY MICHAEL BIDWELL



PAGE 32

WHY MOST CX TRANSFORMATIONS QUIETLY FAIL

HOW TO PREVENT THAT FROM HAPPENING.

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FEATURE	6
How 9/11 CHANGED CONTACT CENTERS	
ARTIFICIAL INTELLIGENCE	12
THE FUTURE OF CX	
BACK OFFICE WFM	16
MANAGING THE BACK OFFICE WORKFORCE	
WORKLOAD MANAGEMENT	20
THE HIDDEN COST OF THOUGHTLOAD	
MANAGING THE WORKFORCE	22
DO AGENTS HAVE THE NEEDED SKILLS AND TRAINING?	
WORKFORCE PLANNING	28
PLANNING FOR CHAOS?	
FULFILLMENT CX	30
HOW TO PREPARE FOR HOLIDAY FULFILLMENT CHALLENGES NOW	
CX TRANSFORMATION	32
WHY MOST CX TRANSFORMATIONS QUIETLY FAIL	
APPOINTMENT SCHEDULING	35
WHY HAVE A CALENDAR-FIRST APPOINTMENT PLATFORM?	

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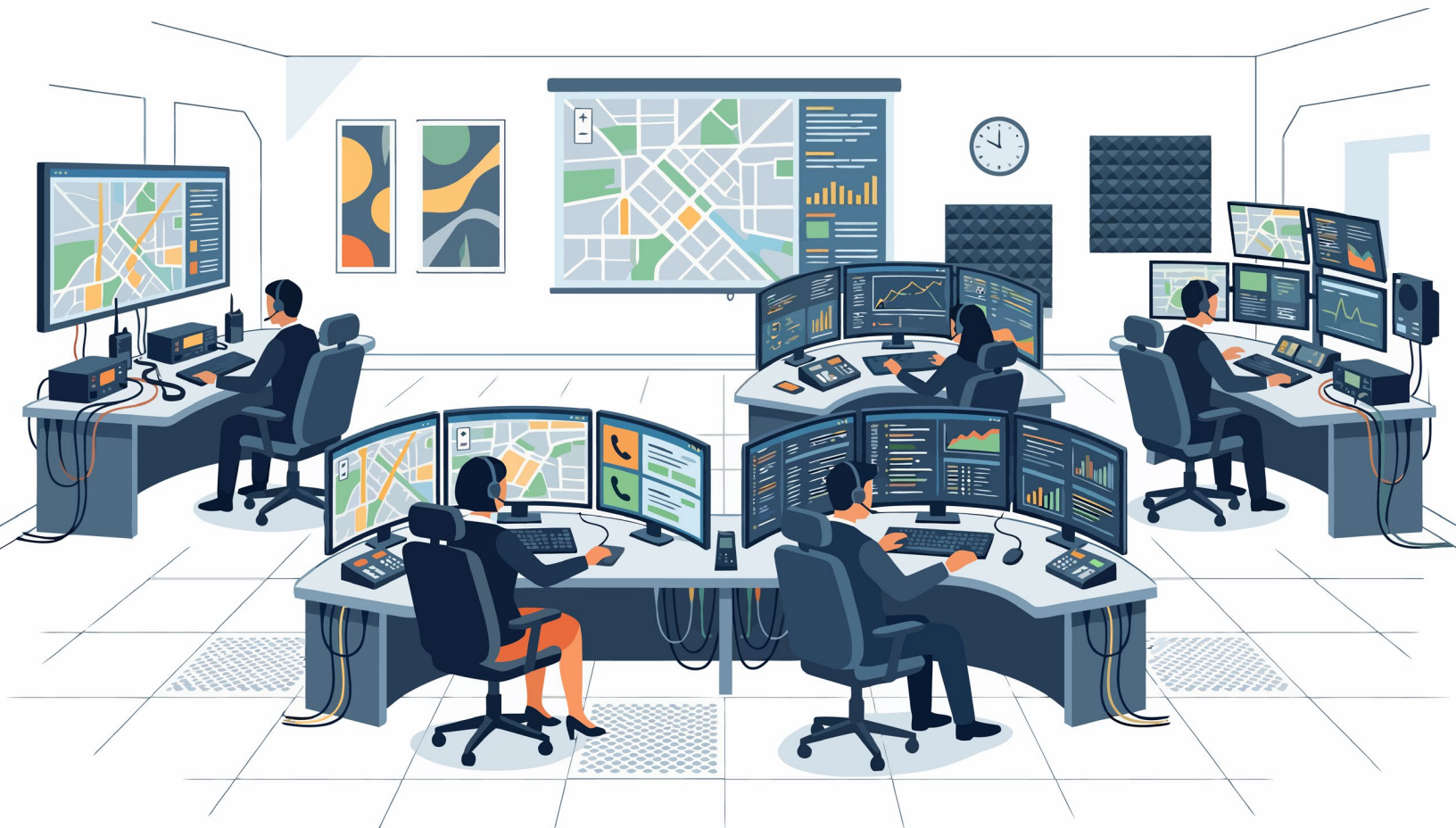


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HOW 9/11 CHANGED CONTACT CENTERS

THE ATTACKS INCREASED BUSINESS CONTINUITY, CONNECTIVITY, REMOTE WORK, AND SECURITY.



This month marks the 25th anniversary of the September 11, 2001 terrorist attacks on the U.S., which we have marked with this article to honor both those who died and the countless others who selflessly helped the victims and their loved ones.

Many of us remember what is now known simply as “9/11.” Most were watching the horrors unfold on their screens and finding out what was going on by phone. Some were handling the waves of calls from worried customers, family members, and employees, and managing the overloaded networks.

But some of us were in New York City and Washington, D.C., witnessing the attacks, evacuating to safety, trying to reach out to loved ones and colleagues, and finding our way home.

Accordingly, we have asked our Advisory Board to share both their recollections and, critically, what, if any, long-lasting effects they think 9/11 has had on contact centers and what we have learned since then. Both our publisher, Linda Harden (**see BOX 1**), and I (**see BOX 2**) have also shared our experiences and observations.



DR. DEBRA BENTSON



9/11 LESSONS FOR BUSINESS

9/11 was a shock to America. The horror of it all played out on television over and over, burning it into the American psyche.

9/11 had many lessons. The one top of mind for me is the need for strong safety and security policies. It starts with having rigor around who you let in.

Safety and security are *everyone's job*. Make detailed policies to protect people and property (in that order), train everyone, and vigorously exercise the plans regularly. I learned this early in my career when I was trained as a guard like everyone else I worked with.

Here are a few tips to consider when developing security/safety plans:

1 **Badging policies must include badging both in and out**

Most places I have worked and visited require badging in when entering but most do not require badging out when exiting the building.

Example: The building is on fire, and the fire department needs to know who is *actually* inside.

2 **Temporary/visitor badges need expiration dates and, if issued to an employee, be linked to the employee's record**

Anecdote: I conducted a security audit on an employee and found there were no badge records for them for months.

I discovered that the employee misplaced her badge and got a temporary one. She never found her badge and just kept using the temporary badge.

The lost badge was not reported or cancelled, a new badge was not ordered, and no one seemed to notice day after day, she had a temporary badge.

3 **"When in doubt, keep 'em out"**

Employees must swipe their own badge at every security door when entering or exiting. Strangers should not be allowed entry without proper vetting.

Anecdote: A group of well-dressed people asked me to let them into the building to attend a meeting. I didn't know them; I instructed them to wait outside while I verified them.

I was told they were executives who were there for a meeting. When asked why I did not let the executives in the building, I simply stated I did not know them and was not going to let them in the building.

"9/11 HAD MANY LESSONS. THE ONE TOP OF MIND FOR ME IS THE NEED FOR STRONG SAFETY AND SECURITY POLICIES. IT STARTS WITH HAVING RIGOR AROUND WHO YOU LET IN."

-- DR. DEBRA BENTSON

4 **"See something, say something"**

Employees need regular training to normalize taking action and reporting suspicious people and activity: even if they are employees. (But do not put yourself in danger!)

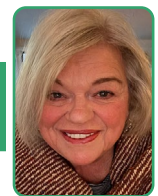
Anecdote: I heard a thud over the partition near where I was meeting with my team. I asked who was there and if they were ok.

There was no response. So, I walked around to the spot where the thud came from and found an employee who had fallen unconscious. I waited with her while a teammate called for medical help.

Keeping people safe and the workplace secure isn't a nice-to-have: it's *mandatory*.

KATHLEEN M. PETERSON

"From The Sidelines"



THE ENGINE WAS ALREADY RUNNING

When I was first asked to contribute to this column, my initial thought was, wow, 25 years—where has the time gone? Events like 9/11 are seared into the memories of those of us old enough to have experienced them firsthand. Looking back, it seemed like an appropriate opportunity to consider what impact, if any, 9/11 had on contact centers.

I began by reviewing the projects we were working on at the time. There were many, spanning multiple industries, but the themes were remarkably similar. Organizations were trying to learn everything they could about building and growing contact centers—technology, staffing, training, workforce management, quality, leadership—all in support of rapidly expanding customer service operations and new business opportunities.





Of course, 9/11 had a profound emotional impact. The reaction was a mixture of shock, grief, outrage, and perhaps most noticeably, connection. For a brief period, people seemed more patient with one another, more thoughtful, more willing to extend grace. It was a difficult time, but also one that reminded us of our shared humanity.

Businesses, meanwhile, were scrambling to assess emergency response plans, security measures, business continuity capabilities, and customer communication strategies. Yet what struck me during my review was that many organizations had only recently emerged from another crisis: Y2K. While the feared system failures never materialized on the scale many anticipated, Y2K had already driven significant investment in technology infrastructure, contingency planning, and operational readiness. Many organizations had upgraded or replaced critical systems shortly before 9/11.

This led me to wonder whether 9/11 changed the direction of contact centers or simply accelerated changes already underway.

Throughout the 1990s, government deregulation, digital telecommunications, toll-free services, centralized operations, and the emergence of internet commerce were reshaping customer service. Contact centers were growing rapidly, both in scale and strategic importance. Organizations were beginning to recognize that customer interactions represented far more than transactions—they provided insight into customer needs, operational performance, and business opportunities. At the same time, offshoring was gaining momentum, and the industry was expanding globally.

From that perspective, the “engine of change” was already running well before September 2001.

“WHAT 9/11 MAY HAVE ACCELERATED WAS THE RECOGNITION THAT CONNECTIVITY, RESILIENCE, AND BUSINESS CONTINUITY MATTERED MORE THAN EVER.”

-- KATHLEEN M. PETERSON

9/11 REFLECTIONS

Perhaps Alan Jackson said it best when he asked, “Where were you when the world stopped turning on that September Day?”

It is a question to which none of us will ever forget the answer. I was in an office in Annapolis. We were all huddled around a little 5-inch black and white TV set, trying to get all the news we could about the events of that day while feeling dumbfounded and numb.

It is a day that had such a profound impact on us personally and as a nation. I think it also had important effects on our contact center industry in ways we could not fully appreciate at the time.

We realized the importance of dispersed operations. It showed us that multisite centers could be an organization’s asset in the face of crisis and emergency. We understood that if one center went down, we could still work and communicate through our network.

I know that remote work really became a necessity during our Covid years, but I do believe that 9/11, followed by Covid, had a profound effect on remote work in our industry.

As much as we realized that a multisite center could provide backup, individuals working from home also ensured that business could resume during disasters. Working from home provided scheduling flexibility, as well as the ability to work across time zones, providing better business continuity.

I’m not sure why it always takes a disaster, but isn’t that the time when we focus on our operations and procedures? Self-service had been introduced in the late ’90s and was taking hold in our industry. But I feel like 9/11 really gave it a boost to advance significantly. If customers couldn’t reach an agent, how could we enable them to help themselves?

Disaster recovery has always been top-of-mind in our centers, but I feel like the meaning really evolved when we started talking about evacuating buildings and the need for mass messaging, not only to our employees but also to our customers. How would that look, and how could we improve for the next event, be it weather-related or an outside attack?

We have learned a lot from this unfortunate experience. In addition to learning what was really important to us personally, we learned how to improve our work environments in areas of safety, mental health for staff, efficiency, and protection of our ongoing business operations.

BOX 1

As President George W. Bush said five years later, “Yet on that awful day, we witnessed something distinctly American, ordinary citizens rising to the occasion and responding with extraordinary acts of courage.”

Lastly, I would love to think that for all the destruction and sadness of 9/11, we learned to be a little kinder and show a little more empathy to others. It was a day that brought us together as a nation.

--Linda Harden

What 9/11 may have accelerated was the recognition that connectivity, resilience, and business continuity mattered more than ever. I remember my first airline trip after 9/11. The lines were long, armed military personnel were visible throughout the airport, and the message was unmistakable: the party was over. The experience reflected a broader shift taking place throughout business and society. Security, preparedness, and risk management had become priorities in ways they had not been before.

Was 9/11 causal? Not directly. The major forces transforming contact centers were already in motion. But it reinforced the importance of those investments and likely accelerated ongoing efforts to improve infrastructure, preparedness, and communication capabilities.

Looking across the past 25 years, however, I would argue that Covid ultimately had the most profound impact on contact centers. Decades of investment in technology, centralization, and remote connectivity were tested almost overnight. Contact centers shifted to remote operations at remarkable speed, proving the value of capabilities that had been evolving for years.

Perhaps that is the lesson from all of these events. Y2K tested systems. 9/11 tested resilience. Covid tested adaptability. Through each challenge, contact centers continued to evolve, serving as a critical link between organizations and the customers who depend on them.

Looking back, I never would have predicted half of what we've experienced over the past 25 years.

Can you imagine what the next 25 years will bring?

MICHELE ROWAN



At the time of the terrorist attacks on September 11, 2001, I was managing a large contact center in Tampa, Florida for Hilton Worldwide.

I was enroute to the contact center when the first building was struck and watched the news from our office as the second was struck. Those moments will stay with me forever, as they will for every one of us...



Employee safety was always a priority at Hilton; we had communication and evacuation actions that were practiced frequently (one of the many benefits of being part of a top shelf and global hospitality company).

During the emergency, Hilton's frontline reservations and customer care representatives worked tirelessly to help customers book and rehouse travelers who were stuck or stranded. And as leaders we focused on furnishing our teams with as much intel, tools, and resources as we possibly could in real time.

"NETWORK REDUNDANCY AND EMERGENCY PLANNING MOVED FROM THE MIDDLE (OR BOTTOM) OF THE PRIORITIES LIST TO THE TOP, FULL STOP."

-- MICHELE ROWAN

The key priorities that I saw arise as a result of 9/11 in our industry were primarily in disaster recovery planning and geographical redundancy. Hilton was already geographically dispersed across the U.S.

Certainly, business continuity plans were prioritized after 9/11: both within the U.S. and internationally. Network redundancy and emergency planning moved from the middle (or bottom) of the priorities list to the top, full stop.

Several years later, remote readiness followed in our disaster recovery planning via remote work readiness. Our early adoption of work from home for contact centers (2007-2008) certainly prepared us well for the COVID-19 pandemic years later.

LAURA SIKORSKI



Following 9/11 I cancelled a few consulting engagements as I just didn't want to fly, and Zoom was not even an option back then. But I did do a few Skype calls.

I also remember data centers were greatly harmed as most of their networks were fed through the World Trade Center, albeit through different service companies and entrances, to a single address location.

Today, most data centers are in different time zones. So are enterprise contact centers, serviced by contact center-as-a-service (CCaaS) and the cloud. Outsourcing interactions to other countries has become the norm as even accents are no longer a problem due to AI.

It was one of those bright September mornings with a premonition of fall in the air.

My wife and I were on the M6 bus from South Ferry that we had boarded from the Staten Island Ferry when our driver gaped through his left rear view mirror and screamed: "The World Trade's on fire!!!"

I stepped off at 23rd Street and stared at the smoke billowing from the north tower. Not long afterwards I watched the plane hit the south tower in an orange and black fireball...

When I got into my office I called my wife, who worked at 34th Street, and said, "We're getting out of here!" The Empire State Building and Madison Square Garden were nearby, and we feared that we could be next.

My wife was also on the phone with our son, a paramedic. He was being called in and would later be performing triage at what would forever be known as Ground Zero...

We decided to evacuate to New Jersey and began walking to the New York Waterway ferry terminal, joined by my sister-in-law. She had taken the 1 subway train and had heard a boom as it passed beneath the towers. But she fell ill, and when we docked was taken to a nearby hospital, accompanied by my wife.

I was hoping to cross back into Staten Island and get my car to pick up my wife and sister-in-law. But the authorities weren't letting people cross from New Jersey to New York, so I stayed at a friend's house. That evening I sent - and answered - all too many "Are You OK?" emails...

Our family would be reunited a few days later, thanks to our son who could get through the security cordons. But I would only go back into the office once; I had carried out my company-issued laptop and connected it at home.

There would eventually be a return-to-office so-called "normal." But it wasn't the same. My wife endured far longer commutes where sometimes the other commuters would start crying.

The Remote Work Shift: and Risks

After each disaster like the SARS outbreak, Hurricane/Superstorm Sandy, and particularly after the COVID-19 pandemic, more people worked remotely and wanted it to continue.

Each time the technologies improved, and more best practices were developed, which made remote work even more practical and attractive.

Remote work has also proven critical for call centers. Customers want to know what is going on, especially when events happen, so agents need to be in safe locations.

But workers were reminded that they too were vulnerable to disasters at home and must plan (and improvise) accordingly.

We were living on the Jersey Shore when Sandy hit and evacuated to my sister-in-law's apartment; again, I was carrying a laptop. When we returned, we found that our apartment was intact, had heat and hot water, but there was no power and little connectivity.

So, each day we drove to the nearest coffee shop that had both, joined by many others, and drove back in time to meet the National Guard-enforced curfew.

Even with the risks, one can't blame workers, like call center agents, for preferring to work remotely. It enables them to live where they want, free from expensive, time-draining, and dangerous commutes, and perhaps most importantly, to be close to their loved ones.

--Brendan Read

"I ALSO REMEMBER THAT DATA CENTERS WERE GREATLY HARMED AS MOST OF THEIR NETWORKS WERE FED THROUGH THE WORLD TRADE CENTER... TODAY, MOST DATA CENTERS ARE IN DIFFERENT TIME ZONES."

-- LAURA SIKORSKI

Here are a few personal memories I would rather *not* have...

- My brother and his wife were in Las Vegas to adopt and bring home their baby daughter. Plane travel was pretty much nonexistent, but with the help of my sister-in-law, who worked for an airline, they were able to get back home by 9/16. Very stressful and sad for all of us.
- My other brother had just dropped our mom and her friend at LaGuardia Airport (LGA) to fly out for a speaking event in Washington D.C. about the Holocaust.

I called him several times on his cell to explain what was happening - calls were dropping - and stressing he had to get them home.

It was difficult for him to get back into the airport and park due to police redirecting traffic away from the airport. The traffic out of LGA was pretty much a parking lot and it took him hours to find them and get them home.

- Another moment that stands out for me was going to a wedding at a venue in Queens, New York City a few days after 9/11 and still seeing the smoke out the floor to ceiling windows.

Every time I see this couple I remember their wedding, why they chose not to cancel, and why my entire family went... we wanted to remember their wedding as the happiest day of their lives and how it brought joy to all who came.

The weirdest part? I live on Long Island about 50 miles from New York City and two miles from the Long Island Sound. For days we heard our military jet fighters that were protecting our airspace. We felt safe and were very proud. 🕊



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.



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

↓

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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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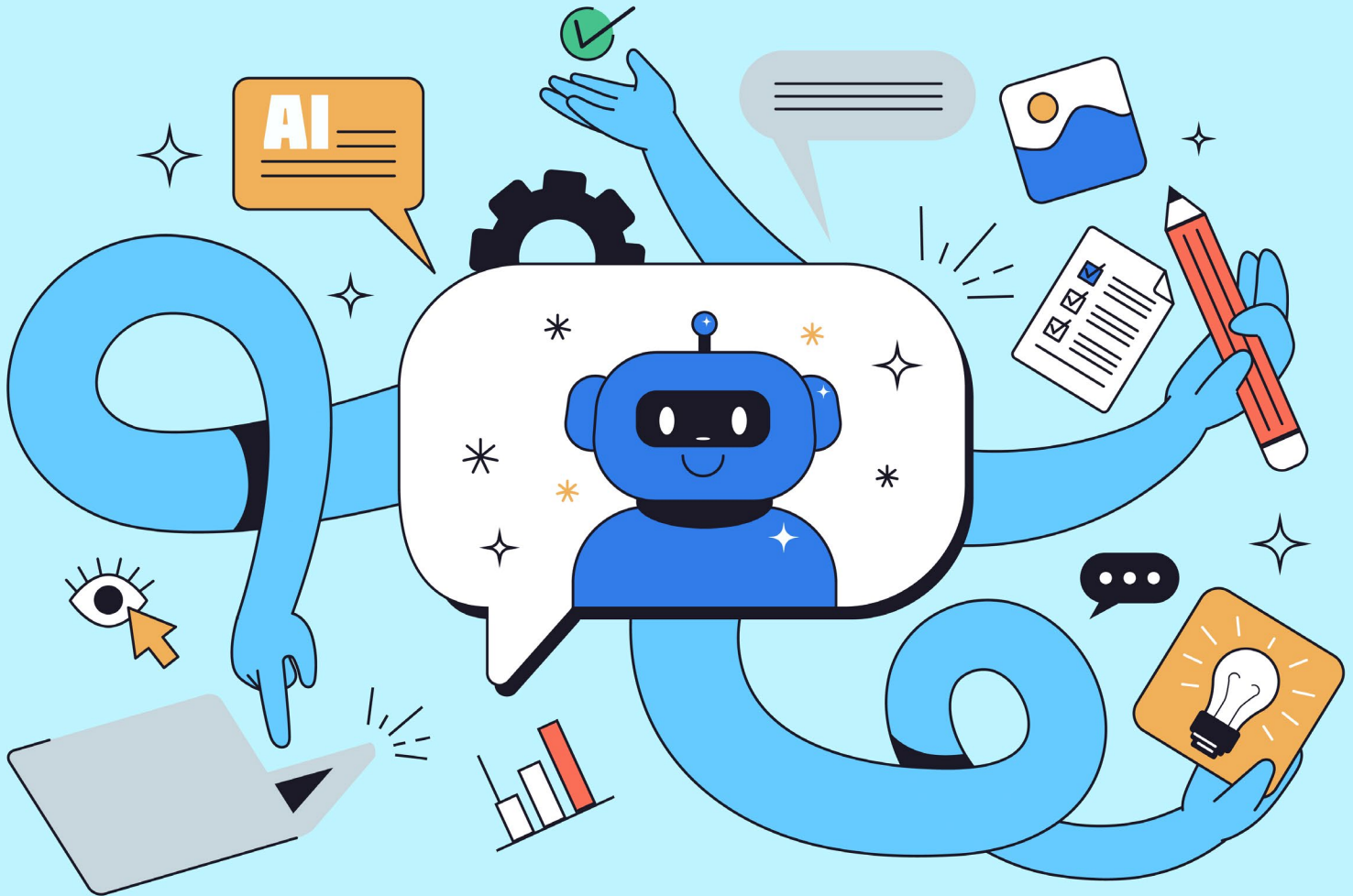


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THE FUTURE OF CX IT IS AI-ORCHESTRATED, NOT AI-REPLACED.

One of the most persistent and mistaken narratives in enterprise software is that AI will render today's platforms obsolete, including customer experience (CX) solutions.

The argument sounds compelling on the surface. If AI can respond to customer interactions, predict behavior, personalize responses, and automate workflows, why do organizations need contact center-as-a-service (CCaaS), workforce engagement management (WEM), or customer relationship management (CRM) solutions?

The answer is straightforward because AI is an intelligent orchestration

layer, not a replacement for the functionality these platforms provide. AI enhances CX platforms and makes them smarter, faster, and more adaptive, but it does not eliminate the need for those platforms.

Let's look at the reasons why and how AI helps them.

CCAAS: THE COMMUNICATIONS INFRASTRUCTURE AI CANNOT REPLACE

CCaaS solutions provide the essential connectivity and communications management that powers every inbound and outbound customer interaction in a contact center.

AI...ENABLES CCAAS PLATFORMS TO ADAPT IN REAL TIME, CONTINUOUSLY LEARNING FROM INTERACTION OUTCOMES TO REFINE AND OPTIMIZE ROUTING DECISIONS.

This includes voice and digital interactions, cross-channel session management, and quality of service (QoS). These are the transport, routing, and queuing infrastructure upon which AI operates.

What AI *should* be doing is making CCaaS platforms more intelligent:

- **Traditional routing engines** deliver interactions based on static routing rules and logic.
- In contrast, **AI-enhanced routing** evaluates customer intent, sentiment, signals, interaction history, and real-time context to make dynamic decisions about the optimal path for each interaction.

In some cases, that means routing the interaction directly to an AI agent. In others, it routes to a human specialist.

AI, then, enables CCaaS platforms to adapt in real time, continuously learning from interaction outcomes to refine and optimize routing decisions.

The result is *not* a replacement of the CCaaS communication and transport layer, but a *transformation* of it from a reactive switching system to an intelligent orchestration engine.

Enterprises still need a reliable, secure, and scalable omnichannel communications infrastructure. AI does not provide a dial tone, manage telecommunications protocols, or ensure 99.999% system uptime. CCaaS does.

What's changing is that AI elevates CCaaS from a rules-based utility into an intelligent strategic platform that improves CX outcomes, operational efficiency, and competitive differentiation.

JUST LIKE THEIR HUMAN COUNTERPARTS, AI AGENTS NEED TO BE MONITORED, MEASURED, COACHED, AND OPTIMIZED.

WEM: AI AMPLIFIES THE NEED FOR OPERATIONAL EXCELLENCE

If there is one area where the "AI replaces everything" narrative most misses the mark, it is WEM. The more AI an organization deploys, the greater its need for data, structure, governance, quality oversight, performance analytics, and continuous improvement, which are core disciplines of WEM.

Just like their human counterparts, AI agents need to be monitored, measured, coached, and optimized. Their knowledge bases must be accurate and kept current. Their outputs must meet compliance and quality standards and be structured to meet the needs of each audience they support.

Moreover, the front- and back-office operating environments WEM platforms support require adaptive and orchestrated workforce management (WFM) solutions that support hybrid environments with human and AI employees that handle voice, digital, and asynchronous interactions.

WEM is evolving from a set of internal- and external-oriented analytics solutions designed to optimize a human workforce into an operational backbone for managing hybrid human-AI contact centers and back-office operations.

Modern WEM platforms deliver unified analytics that evaluate performance across all resources, AI agents, human agents, and self-service, providing managers with visibility into what is and isn't working across channels and functions.

AI is transforming how WEM capabilities are delivered:

- Automated quality management (AQM) can now evaluate 100% of interactions, and it's time for it to replace outdated manual and limited QM initiatives that address only 1% to 2% of all customer inquiries.

- AI-powered coaching delivers personalized guidance in real time while predictive analytics delivers the right offers to each customer.

- Real-time adaptive intraday management WFM modules proactively adjust employee schedules, avoiding expensive overtime and last-minute reactive schedule changes that negatively impact employee satisfaction.

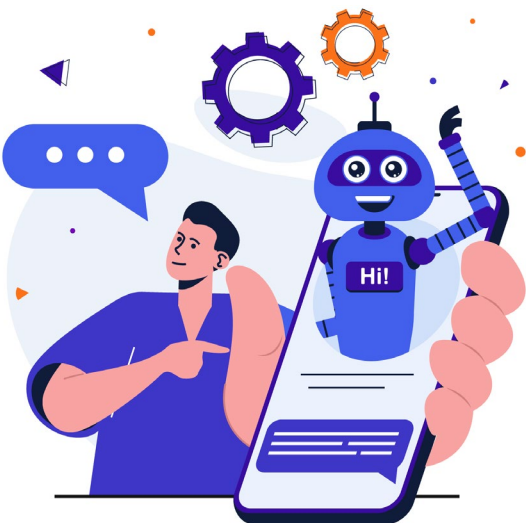
The functions that WEM platforms traditionally provide, including QM, recording, WFM, conversation analytics, performance management, coaching, and more, are not going away. What *is* changing is how these functions are performed and the outcomes they deliver, both of which are being enhanced by AI.

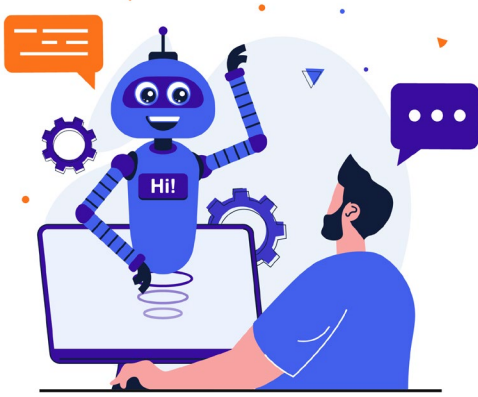
The need for these solutions is increasing as CX operations become more complex and dependent on AI technology, which requires a great deal of oversight, along with guardrails. AI agents must be continuously monitored for accuracy, compliance, and quality, just as human employees are.

CRM: THE CUSTOMER MEMORY THAT AI DEPENDS ON

CRM systems keep track of each customer's relationship with an enterprise. This includes account details, along with their purchases, preferences, service inquiries, and cases.

Like CCaaS and WEM, AI enhances performance, flexibility, intelligence, and outputs from CRM solutions, but it does *not* eliminate the need for these capabilities.





AI automates data capture, surfaces customer signals, identifies actionable insights from structured and unstructured communications, proactively identifies customer needs, and detects at-risk customers.

Consequently, it enables companies to build effective customer engagement strategies that enhance loyalty and profitability.

AI-powered CRM transforms static customer records into dynamic relationship data and intelligence. But the underlying need for a system of record that captures, organizes, and makes accessible the full history of each customer relationship remains foundational for both front- and back-office operations.

But there is more to the AI story. Organizations attempting to deploy generative AI (Gen AI), large language models (LLMs), and agentic AI without a robust CRM platform discover that even the most sophisticated models are ineffective when operating on incomplete or fragmented customer data.

AI DOES NOT MAKE CRM OBSOLETE; IT MAKES IT MORE ESSENTIAL. LIKE CCAAS AND WEM, CRM IS A FOUNDATIONAL LAYER THAT GIVES AI STRUCTURE AND DATA.

AI can generate personalized responses, predict behavior, automate decisions, and do much of the fulfillment, but *only* if it has access to accurate, comprehensive, and well-structured customer data.

For without a reliable system of record that captures the full history of each customer relationship, AI lacks the memory and context it needs to personalize interactions, anticipate needs, and deliver consistent experiences across channels and touchpoints.

AI does not make CRM obsolete; it makes it more essential. Like CCaaS and WEM, CRM is a foundational layer that gives AI structure and data.

THE REAL TRANSFORMATION: INTELLIGENT AND ORCHESTRATED PLATFORMS

The pattern across CCaaS, WEM, and CRM platforms is consistent: AI is not eliminating these platforms, but it is fundamentally enhancing what they can do.

- Routing becomes intelligent, adaptive, and orchestrated.
- QM shifts from evaluating statistically invalid samples to assessing 100% of them.
- Customer records evolve from static repositories into predictive intelligent engines that proactively identify customer behavior.
- WFM expands from scheduling humans to orchestrating hybrid AI/human operations, dynamically balancing workloads based on interaction complexity, business priorities, and resource availability.

AI changes the intelligence, precision, and speed at which a company operates.

Organizations should focus on the platforms' integration and interoperability. In an AI-enabled CX environment, the value of CCaaS, WEM, and CRM increases when they share customer data, signals, and insights.

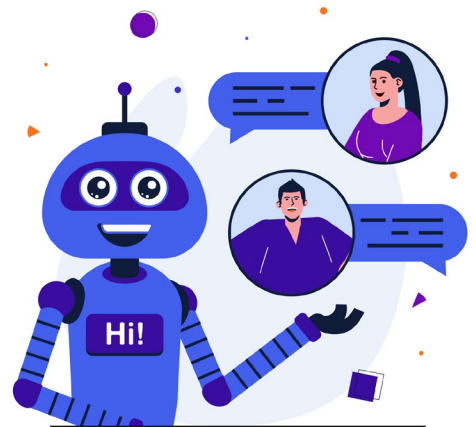
AI serves as the orchestration layer that provides the intelligence that ties these systems together, enabling companies to make real-time decisions that vastly improve both the CX and employee experience.

FINAL THOUGHTS

The debate over whether AI will replace CCaaS, WEM, and CRM reflects a fundamental misunderstanding of what these systems do and the role of AI.

AI is a transformative technology that enhances decision-making, automates routine tasks, and enables real-time adaptation. It is an intelligent orchestration layer that operates on top of the infrastructure and data layers to improve all aspects of the customer journey.

AI's contribution to CX organizations depends on the volume and quality of the data moving through and across these platforms. However, contact centers still need communications platforms, operational management and analytics frameworks, and a system that tracks the entire customer relationship.



The *real* risk for enterprises is not that AI will make their CX platforms obsolete, but instead that they won't move quickly to modernize those core platforms to take full advantage of what AI offers.

Meanwhile, the real risk for vendors that provide these platforms is that competitors will deliver AI-native or enhanced versions of the same capabilities faster and more effectively.

The future of CX technology is not about replacement; it is about transformation, integration, and intelligent orchestration of the foundational platforms that enterprises depend on to serve their customers.📍



Donna Fluss, Founder and President of DMG Consulting LLC, provides unparalleled understanding of people, processes, and technology driving the transforming contact center/back-office markets. As the foremost analyst of these markets, Donna provides guidance to technology leaders, new entrants, investors, and enterprises building next-generation AI-enabled contact centers. Contact her at Donna.Fluss@dmgconsult.com

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MANAGING THE BACK OFFICE WORKFORCE

HOW SCHEDULING BACK OFFICE STAFF IMPACTS CONTACT CENTERS.



ILLUSTRATION PROVIDED BY ADOBE IMAGES

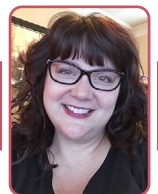
Back offices provide several critical business functions, among them: accounting, billing, claims management, IT, and order processing. Tasks whose delivery and quality of performance affect those of front offices, like contact centers when they engage with customers.

So, it stands to reason that how back offices schedule their staff and ensure their adherence will impact contact centers.

To learn more about back office workforce management (WFM), we had a virtual chat with Tiffany LaReau, Founder and Certified Workforce Manager at Human Numbers and a member of our Advisory Board.

Q TELL US A LITTLE ABOUT YOURSELF, INCLUDING YOUR STRONG INTEREST IN WORKFORCE MANAGEMENT (WFM) AND WHAT DRIVES IT.

TIFFANY LAREAU



A: I started work as a temp in a call center in 1988, the week after I graduated high school. They made me permanent and I jumped around in various roles, including a front line phone-bank agent and a back office business analyst.

In 1994, I was in the role of software engineer, writing automated scripts for repetitive tasks like issuing routine customer refunds (an example of "AI" in its earliest form) when my manager asked for a volunteer to learn a brand new software called workforce management.

I raised my hand, drove to Nashville, Tenn. and began learning TCS in a crowded room above a hibachi restaurant. I quickly found I was good at this work, especially forecasting. *I love forecasting!*

Q LET'S SET THE STAGE. DO THE FUNCTIONS OF THE BACK OFFICE, ALSO OPERATIONS MATTERS LIKE STAFF AVAILABILITY, AFFECT THE CONTACT CENTER AND IF SO, HOW?

A: Schedule adherence might be completely out of the picture because it may not be necessary. But when the back office gets backed up that can trigger new phone calls from people checking in for status updates, and that is a circular relationship between both groups.

Q IS STAFF FORECASTING AND SCHEDULE GENERATION FOR BACK OFFICE WORK I.E., WFM, DIFFERENT THAN THAT FOR THE CONTACT CENTER? DOES THE BACK OFFICE USE WFM SYSTEMS AND ARE THERE ANY SPECIAL CONSIDERATIONS?

A: Forecasting in back office is complicated by work that spans multiple days/hours. When there is down time because a request is in a pending status, that can be tricky for traditional WFM systems.

One solution is to decouple the forecast using a time-shift operator for lead times, then breaking down the work between its arrival date versus its completed date. To really get it right, the carry-over volume must be incorporated to make sure you're covering any backlogs that are in play.

There are areas with back office WFM that are easier than with contact center WFM. For example, schedule bids are usually not on the table with back office groups because frequent rotations may not be easily tolerated by that group of workers.

Moreover, lunch and break optimizations are only necessary when there's a full coverage model requirement, meaning the services require replies within seconds or minutes, not hours/days.

Another perk for back office scheduling is the paid time off (PTO) approval process might be way more lenient because of less restrictions on the number of people off at the same time.

This also makes it much easier to plan for events that include all employees, like team meetings or seasonal celebrations, because you don't have to worry about keeping someone behind to cover the phones while everyone is away.

Q DO YOU MEASURE BACK OFFICE WORK? IS IT DIFFERENT COMPARED WITH CONTACT CENTER WORK?

A: In terms of how quickly things are getting handled, phone work and chat (front office) are usually measured by average speed of answer (ASA), service level (SL), and abandonment rate.

Back office work does not require the same level of urgency, and I measure it using a response time goal.

For example, calculating the required staff for off-phone activity that has a three-day time-to-process goal doesn't fit in the ASA or SL metric calculation, so the solution to this is response time. The formula is easy enough: volume divided by (response time divided by AHT).

The trick is remembering to convert the response time to the same FTE hours in a day. So, if the goal is three days, and a full-time employee works eight hours a day, the response time is 24 (8 x 3 = 24). If the volume is 50, and the handle time is 1.5 hours, the entire formula is:

$$50 \div 24 \div 1.5 = 3 \text{ PEOPLE}$$

"...SCHEDULE BIDS ARE USUALLY NOT ON THE TABLE WITH BACK OFFICE GROUPS BECAUSE FREQUENT ROTATIONS MAY NOT BE EASILY TOLERATED BY THAT GROUP OF WORKERS."

-- TIFFANY LAREAU

All methods use handle times and volume, but front office work also uses an Erlang calculator that includes extra time for people that will need to be in the idle state, waiting on the next customer, which is required to meet ASA and SL goals. This becomes the inverse of the utilization/occupancy factor.

Q WHAT DO YOU SEE AS THE POTENTIAL PITFALLS AND RED FLAGS IN WFM FOR THE BACK OFFICE?

A: A lack of available reports is common; time trial studies can help with that, especially if you're starting from ground zero.

Many back office work groups do not have long term staffing models (capacity plans). One reason for this is because they attribute that kind of thing to "call centers" and don't feel they are a call center.

But back offices can still benefit from a weekly long term plan because they still have seasonal volume, attrition, and they experience irregular planned time off.





MICROSHIFTING AND THE BACK OFFICE/CONTACT CENTER

There are now discussions taking place about microshifting. This scheduling method breaks up workplace shifts into short segments when the work is being performed.

Microshifting accounts for personal tasks like picking up a child at school, a medical appointment, or a five to 10-minute fitness break in a workday, while ensuring adherence to the total number of hours the employee is committed to working.

So, we asked Tiffany about microshifting, and whether it applies to the back office and/or the contact center? If so, what are its benefits and the challenges, and what are her recommendations for using it?

"Microshifting in the workplace is very similar to microshifting in personal development: tiny, flexible, incremental changes that make positive, gradual adjustments," says Tiffany.

"But sometimes the front office employees, like contact center agents, are hourly, which means they are eligible for overtime, and the back office employees are salaried (no overtime). The motivation for flexible shift coverage can be different between those groups.

"Salaried workers can compensate for time taken for non-work activities by working longer to make up for it. But rigidly scheduled hourly workers do not have that freedom; if they go off-line, like for errands outside of scheduled breaks and previously agreed-to PTO, they could lose their hours and wages.

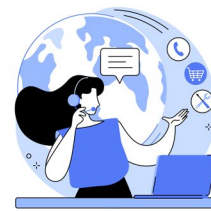
"My recommendation is, if you are considering microshifting (or any other change), be prepared to protect employee satisfaction (pay, hours, benefits, tools). Also protect employee engagement (purpose, belonging, impact) when touching anyone's schedule.

"There's a great leadership book about this and more by Justin Robbins titled *More Than a Motto*.

"Regardless of your back office or front office (contact center) scheduling approach, it's always a good idea to include the staff in the scheduling process itself; forming a schedule task force and including them from start to finish will create allies along the way."

Forecast accuracy for the back office also needs to be measured with a little more finesse than in a contact center. I recommend extending it to four components:

1. Noise (unrepeated things).
2. Short-lived events that were purposely ignored.
3. Differences due to external business decisions other people made.
4. Incorrect trend/growth rate assumptions which will naturally be absorbed into the forecasting methodology going forward.



It's a little more complicated, but unless your forecast is incredibly unstable, I find that it's not necessary for all four criteria to exist with every single weekly forecast; it only needs to happen when one of those criteria actually exists during the forecasting range.

"FORECAST ACCURACY FOR THE BACK OFFICE ALSO NEEDS TO BE MEASURED WITH A LITTLE MORE FINESSE THAN IN A CONTACT CENTER."

Q AS A WORKFORCE MANAGER YOURSELF, WHICH DO YOU LIKE DOING MOST? BACK OFFICE OR CONTACT CENTER?

A: Since we have other WFMers here at Human Numbers that are better skilled at scheduling and training than I am, I choose to only work on forecasts and long-term staffing models.

From that perspective, a back office forecast is equally as fun as a front line forecast, and I am happiest when it's just me and my Excel file, pounding away.



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

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THE HIDDEN COST OF THOUGHTLOAD

HOW IT IMPACTS YOUR CONTACT CENTER.

You've just finished a shift hand-off. You pulled the numbers: handle times are acceptable, schedule adherence is solid, and staffing levels look right on paper.

But it doesn't feel like it should. People are going quiet in team meetings, dodging coaching sessions, and calling in sick on Mondays. Even the people who are in their seats look exhausted before noon.

So, what's going on?

While you've been working hard to ensure the workload is manageable, you're ignoring the weight of people's *thoughtload*.

WHAT IS THOUGHTLOAD?

Thoughtload is the invisible tax on performance that comes from rising cognitive demands, increasing emotional burdens, and declining energy reserves. Workload is everything on the agent's screen. Thoughtload is everything in their head.

In a contact center, where agents absorb human distress for hours at a stretch, get scored in real time by algorithms, and pivot instantly from a grieving customer to a routine password reset, the gap between workload and thoughtload is enormous.

And ignoring it is costing you in call quality, engagement, and employee wellbeing.

Let's break thoughtload down into its components.

The first is rising cognitive demands.

We know the cognitive intensity per call is rising, not falling. As AI handles routine inquiries, the interactions left for human agents are increasingly complex, charged, and unscripted.

A recent study by Salesforce shows that 77% of agents now report increased and more complex workloads compared to just one year ago, and 56% say they've experienced burnout, which is a strong indicator that they may leave their jobs.

The second component is the emotional demands.

Contact center work is more than just cognitively demanding; it is one of the few workplaces where emotional contagion is a structural feature of the job, not an occasional occurrence. Very few people reach out to a contact center when they're happy and relaxed.

Agents face a barrage of customer frustration, anger, impatience, and stress. Understandably, they carry emotional residue from one call to the next, with little buffer between.

It's no wonder thoughtload is so high.

THE COST OF A HEAVY THOUGHTLOAD

High thoughtload shows up in myriad ways.

First, it can make it hard to focus and manage the complexity of information coming from the caller and on the various screens. High thoughtload makes it more likely that the agent will misspeak or make an error.

Second, thoughtload can also lower the trigger point for emotional reactions, making it harder for the agent to stay calm and work through the call constructively.

Finally, carrying a heavy thoughtload drains energy more quickly, resulting in fatigue, disengagement, and even burnout.

The managers overseeing all of this are carrying a thoughtload of their own, having to deal with queue anxiety, escalation pressure, QA scores, attrition risk, workforce scheduling gaps, and the emotional labor of being the buffers between the organization's demands and the team's limits.

High thoughtload is a big risk for everyone in the contact center.

THREE TECHNIQUES TO LOWER THOUGHTLOAD

If you want your calm, focused, energized team back, you need to help them get their thoughtload in check. Here are three things you can do to chip away at the problem.

1 PICK ONE COMPELLING OUTCOME

Contact centers run on metrics: AHT, CSAT, FCR, Occupancy. These are important, but they create a particular kind of thoughtload: agents chasing multiple

numbers that sometimes directly contradict each other, such as:

- Be fast but be empathetic.
- Resolve the issue on the first call but follow the full compliance script.

When everything is a priority, nothing is. And agents default to the same logic as overwhelmed people everywhere: do what feels least risky, not what creates the most value.

The best thing you can do is help people focus on the higher-order outcome they are uniquely accountable for driving.

One compelling outcome for an agent team might be: "Every customer leaves this call feeling heard and helped."

That North Star cuts through the metric noise. It makes some things more important and reveals others as trivial, irrelevant, or merely nice-to-have, which is exactly the cognitive relief your agents need.

Once they've got their eyes on the prize, help them triage everything else. What is less important? What can wait until a future contact? Getting people focused on what actually matters is the first step in alleviating thoughtload.

2 PROCESS EMOTIONS THAT ARISE

Focusing attention is just the first step. The next one is to reduce the emotional burdens triggering threat responses. The key thing to know is that emotions tend to erupt when something of value feels threatened: when the dragon is breathing fire, it's because it's protecting treasure.

In a contact center, agents are protecting treasure on every shift. The treasure might be their sense of competence ("I was trained for this — why can't I handle it?"), their dignity ("That customer spoke to me like I was nothing"), or their employment ("I don't know if I'm going to get in trouble for how that went").

When an agent goes silent in a huddle, snaps at a colleague, or disengages mid-call, that's a signal, not a performance problem. Your coaching questions become:

- What felt threatened there?
- What was at stake?

- How did you imagine the conversation playing out?

Those questions open a very different conversation than "Here's your score, here's what you need to improve."

The key is not to rush, invalidate, or smooth things over. Ask open-ended questions to uncover what's really at stake and to help reframe the situation so there's a constructive path forward.

There will be valuable data in the answers: about broken processes, unrealistic expectations, and gaps in training or tools. There will also be bias, catastrophizing, and drama that you can interrupt before it spreads to the rest of the team.

Think of this as helping agents metabolize those potent emotions: turning them into energy and growth while filtering out the waste.

One more thing worth noting: *the emotional processing burden falls on you, too.*

Contact center managers absorb their team's distress as well as their own. That is a form of thoughtload that almost never shows up in management training or development conversations but it should.

3 MAKE ROOM TO PROCESS

When you read "build in breaks," it might trigger an anxiety response as you jump to the concern about who covers the queue.

That's a fair objection. The contact center's operating model is designed around occupancy. The goal is to keep agents on calls as much as possible. But maximum occupancy is not the same as maximum performance, and it's not necessarily the path to maximum effectiveness.

A center that optimizes for occupancy while neglecting time for rest and recovery is systematically destroying the very resource it's trying to maximize.

Even small interventions matter:

- A 60-second wrap-up period that is genuinely protected, not automatically filled with a coaching prompt or an after-call task notification, becomes a micro-recovery moment.

CONTINUED ON PAGE 26



DO AGENTS HAVE THE NEEDED SKILLS AND TRAINING?

CUSTOMER EXPECTATIONS AND AI ARE CHANGING REQUIREMENTS.



ILLUSTRATION PROVIDED BY ADOBE IMAGES

Contact centers are in an increasingly tumultuous environment of economic, social, and technological change. Ever-higher customer service expectations, likely accelerated by shifts in consumer spending to upper-income population tiers, combined with new AI-driven automation tools, appear to be placing more pressure on center leaders to ensure they have the right number of higher quality, well-trained staff.

But accomplishing this fundamental task isn't easy with slowing population growth and declining labor force participation rates as older workers retire and women leave or choose not to enter the applicant pools (see December 2025 Feature, "[Staffing Against the Storm](#)," and against limited staffing budgets.

DINA VANCE

To better understand how to help contact centers with their agent recruiting, assessment, and training in today's environment, we had a virtual conversation with Dina Vance, Senior Vice President of Sales & Marketing/Managing Director of North American Operations, Ulysses Learning.

Dina is a frequent contributor to *Contact Center Pipeline* with nearly 40 years of industry experience. Here are her insights in response to our questions.

Q ARE CONTACT CENTERS HIRING AND RETAINING THE EMPLOYEES WITH THE QUALITY - AND IN THE QUANTITIES - THEY NEED? WHAT DEVELOPMENTS AND ISSUES MATTER MOST?

A: Contact center executives are experiencing challenges in hiring and retaining employees at the quality or scale they need. Every executive I speak with echoes the same concern: the challenge is getting harder, not easier.

What's driving this isn't a shrinking need for people. Quite the opposite. As organizations accelerate their AI strategies, technology is reshaping roles by raising skill requirements and increasing the complexity of the work that reaches human agents.

In our research, we are finding AI is not eliminating jobs. Instead, it is transforming them and, in many cases, increasing the need for well-trained AI-literate employees. (Ed. note: see **BOX** for an in-depth discussion on AI).

Research from ICMI underscores the depth of the retention problem. Turnover remains high, fueled by low pay and, most importantly, a lack of career growth opportunities. Half of all agents cite limited advancement as a primary reason for leaving.

At the same time, even with AI automating routine tasks, 87% of contact centers still plan to hire or backfill roles, according to ICMI. This is a clear signal that automation is shifting the nature of the work, *not* reducing the workforce.

Another way to look at the changes impacting our workforce is how AI shifts the profile of the ideal agent. As automation handles simpler inquiries, the interactions that reach humans are more emotionally charged and more complex.

Calabrio (now Verint) reports that 61% of centers are seeing an increase in emotionally intense customer interactions, and customer expectations for empathy in the human interface continue to rise.

This means agents must now excel at being critical thinkers while working seamlessly alongside AI systems that provide real-time guidance and workflow support.

Taking it together, the evidence is clear: contact centers are struggling to hire and retain the talent they need, not because AI is replacing people, but because AI is raising the bar for what human roles require.

These shifts in our industry point to a future where success depends on building a more skilled, AI-augmented workforce. The centers that thrive will be those that invest in elevating human capability to meet the new demands created by AI-driven operations.

"...TECHNOLOGY IS RESHAPING ROLES BY RAISING SKILL REQUIREMENTS AND INCREASING THE COMPLEXITY OF THE WORK..."
-- DINA VANCE

Q WHAT NEW SKILLS ARE AGENTS NOW EXPECTED TO HAVE? AND CAN LONGER-TENURED AGENTS BE TRAINED EFFECTIVELY TO HAVE THEM?

A: This is a great question because it gets to the heart of how new agents and tenured agents each bring different, but equally valuable, strengths to today's contact centers.

Technology enhancements and shifts in customer expectations are reshaping the nature of customer interactions, and as a result, [and as] we have already discussed, the skills required by human agents are evolving.

New hires often enter the workplace with fresh perspectives and come with digital fluency, having been raised on technology solutions.

I think back to my kids' learning experience in school compared to mine. Anyone who entered school in the late 2000s and early 2010s grew up in an education system that was rapidly shifting toward digital learning.

This generation was among the first to complete assignments on school issued devices, whether laptops, Chromebooks, or tablets. Most students were routinely using technology as part of their daily academic experience.

This early exposure to digital tools has shaped how today's new contact center agents think, learn, and problem solve, giving them a natural fluency with technology that complements the AI-enabled environments they now enter.

Tenured agents, on the other hand, carry deep tribal knowledge which should not be discounted. These agents have an intuitive understanding of customer patterns that systems simply are unable to replicate.

In addition, given today's labor market, the financial case for retention of tenured team members is especially compelling because the true cost of turnover is extraordinarily high.

Data consistently shows that replacing an employee typically costs between 50% and 200% of their annual salary when leaders account for recruiting, onboarding, training, and lost productivity during ramp-up, according to "The Myth of Replaceability: Preparing for the Loss of Key Employees."

The [article](#), written by Regina Dyerly and published by the Society for Human Resource Management (SHRM), also points out that in many cases, total costs can climb even higher depending on role complexity and experience level.



Automation has been expanding and will likely continue as AI handles a growing share of customer contacts, both directly through self-service and indirectly through enabling live agents to improve their performance and productivity. It also has and will continue to assist with agent recruitment, assessment, and training.

This ongoing evolution raises three critical questions, which we posed to Dina Vance.

Q ARE CONTACT CENTERS RAISING THE SKILLS BAR WITH AI USE?

DINA: AI is unquestionably raising the bar for what is expected from human agents, and a simple look at how customer interactions are shifting makes this crystal clear.

As automation and self-service tools take over routine tasks, the questions that still require a human are no longer the quick, transactional ones. They are the emotionally charged, complex, and high-stakes situations where empathy, judgment, and nuanced problem solving matter most.

Calabrio (now Verint) reports that 98% of contact centers now use AI, meaning that the “easy stuff” is being handled before a human enters the conversation. A simple example illustrates the difference:

- If a customer asks, “*What’s my account balance?*” an AI chatbot can answer instantly and accurately.
- But when a customer asks, “*Why did my bill suddenly increase, and what can I do to reduce it because I live on a fixed income?*” the situation becomes far more nuanced.

The customer’s emotions are impacting the conversation and require a different level of response. The scenario requires an agent to think critically about the specific situation/question and explore options to find the best solution.

That requires a level of care and the ability to interpret context, which are all skills that humans excel at and AI cannot fully replicate.

This is our new reality. AI handles the predictable while humans handle the emotional.

And because of that, contact centers are raising their hiring standards. They now seek agents with stronger communication abilities, which gives individuals with higher emotional intelligence and sharper analytical skills the upper hand.

People who can partner with AI tools rather than be replaced by them will find they are invaluable to the contact center space. AI is elevating the human role, making the human contribution more essential than ever.

Q IS AI-POWERED SOFTWARE CHANGING APPLICANT SCREENING, TRAINING, COACHING, AND PERFORMANCE MANAGEMENT?

DINA: AI-powered software is absolutely transforming these functions in contact centers and the shift is both profound and practical.

Today’s AI tools allow organizations to evaluate candidates in ways that were impossible even a few years ago. Instead of relying solely on interviews, centers can now observe how applicants actually behave in customer facing situations.

Our own AI-driven simulator is a perfect example: applicants interact with realistic customer scenarios, allowing us to see their innate customer experience (CX) instincts such as how they listen, how they problem solve, and how they respond under pressure.

It’s a modern answer to an old analogy I’ve used for years: a farmer once spent every season training his dogs to gather pecans from his grove, until his wife finally suggested he use squirrels instead.

The point is simple: it’s far easier to start with the right people and train from there. AI now helps us find those “squirrels” with far greater accuracy.

The benefits extend well beyond hiring. AI accelerates onboarding through micro learning and adaptive training paths that adjust to each agent’s pace. Supervisors gain richer coaching insights through real-time data that can be captured on every interaction.

It’s no surprise [then] that 66% of leaders support AI applications. But AI isn’t without downsides. I was recently part of a panel interview for a new leadership position, and the experience perfectly illustrated both the power and the limits of AI in hiring.

The company I was supporting had built a large language model (LLM)-based screening tool designed to evaluate candidates for specific attributes—adaptability, communication style, decision making—and then score their likelihood of success on a scale of 1 to 50. It was a well-designed system meant to bring objectivity and consistency to the early stages of hiring.

Without knowing any of the AI-generated scores, our panel interviewed a candidate who immediately stood out. His answers were solid, but what really struck us was his presence. He was instantly likeable. He fit the culture in a way that you can’t quantify on a spreadsheet.

After the interview, we learned the AI had given him a score of 38. Respectable, but not exceptional. Yet every one of us on the panel agreed he was the right person for the role.

That moment reinforced something essential: *AI can evaluate patterns, but humans can detect potential.* AI can measure competencies, but humans can feel chemistry. AI can flag risks, but humans can sense fit. There is a dimension of human connection that algorithms simply cannot fully capture.

This is why AI should be a decision support tool and is not intended as a decision maker. It can do a lot, but it cannot replace the human ability to recognize cultural alignment. The best hiring outcomes happen when AI provides the data and humans provide the judgment.

Q FROM WHAT YOU ARE SEEING WITH AUTOMATION LIKE THAT ENABLED BY AI, WHAT IS YOUR CONCLUSION WHEN LOOKING AT THEIR APPLICATIONS IN CONTACT CENTER HIRING AND TRAINING?

DINA: The contact center workforce is undergoing a profound transformation. AI/technology enablement is reshaping roles layered with rising customer expectations and uncertainty in the labor market. The centers that will thrive are those that:

- Invest in people as much as technology.
- Build structured career growth and upskilling programs.
- Use AI to augment human capability.
- Prioritize emotional intelligence and complex problem-solving skills.

The future of CX will be delivered by AI-empowered, highly skilled human agents and the time to build that workforce is *now*.

"...IF THERE IS ONE ATTRIBUTE MOST NEEDED IN OUR AGENTS TODAY, IT IS THEIR ABILITY TO BE COMPLEX PROBLEM SOLVERS..."

In a tight labor market, where roles remain unfilled longer and competition for talent drives up wages and hiring costs, these replacement expenses are amplified even further. Both groups are essential and when developed intentionally, they complement each other in powerful ways.

Consider a customer who reaches out not with a simple request, but with a layered concern such as, *"I've tried resolving this three times already. What's actually going on, and how do we fix it for good?"*

That kind of interaction demands the ability to interpret context and the skill to navigate multiple systems and policies to uncover the real issue. These are the moments that define a customer's perception of the brand.

This is critical. Contact centers remain the face of their companies, often representing the highest number of customer touchpoints. One thought to consider is customers rarely remember the exact words exchanged but they remember how the interaction made them feel.

AI cannot evoke that feeling. But a skilled CSR can. *That's why hiring must focus on the human capabilities that create connection.*

This shift is reflected in the new skill expectations for modern agents. They must demonstrate emotional intelligence and de-escalation, which have become essential as difficult interactions rise by 61% (Calabrio/Verint), as I cited earlier.

Agents must be comfortable working alongside automation tools that surface knowledge or guide next steps. They need to communicate seamlessly across omnichannel environments: voice, chat, email, and social.

And if there is one attribute most needed in our agents today, it is their ability to be complex problem solvers because automation has already removed the easy tasks from their queue.

Longer-tenured agents, meanwhile, bring knowledge and they can be role models for the new hires in understanding the nuances of processes and customer sentiment in ways that no system can fully capture.

The question isn't whether they *can* learn new skills because as a learning company we firmly believe everyone can learn new skills.

The real issue is that most organizations lack the structure to help them do it. Organizations often miss the opportunity to offer upskilling pathways to help both new and experienced CSRs reach their full potential.

Q ARE THERE FEWER SUITABLE APPLICANTS? WHAT SKILLS ARE MISSING? ARE CENTERS HIRING LESS QUALIFIED CANDIDATES AND TRAINING THEM MORE?

A: Recently, I've been deeply involved in researching how to attract stronger candidates into the contact center labor pool, and the experience has been eye opening.

There are absolutely fewer suitable applicants today, and much of that decline stems from a fundamental shift in what younger generations want from work.

Think about the traditional contact center role—tethered to a headset for eight hours, following strict schedules, and managing a constant stream of emotionally charged interactions—and then compare that to what we know recent graduates value.



These prospective employees want flexibility, autonomy, variety, and work that feels meaningful. At least, that's exactly what my own recent college graduate tells me.

A "butt in seat" job with rigid structure and high emotional labor simply doesn't align with those expectations, which naturally shrinks the pool of applicants who are both interested in and prepared for the realities of the role.

As a result, many candidates lack the core skills needed today: critical thinking, resilience, emotional intelligence, and the ability to navigate technology-enabled workflows.

Because of this, contact centers are hiring less qualified candidates more frequently, but they're compensating with stronger training programs, better onboarding, and more structured development pathways.

My recent graduate also pointed out how much culture matters on Day 1 of a new job. When people join a company, they want to be welcomed into a clear vision and connected to people who make them feel part of the brand.

The solution isn't to lower the bar; it's to change how we help people reach it.

That means designing onboarding experiences that accelerate skill development and create opportunities that make the role feel like a stepping stone rather than a dead end. It also means building a culture where agents feel supported rather than monitored.



"ONE OF THE MOST MEANINGFUL STEPS, THOUGH, IS GIVING PEOPLE A SAFE PLACE TO PRACTICE AND LEVEL UP THEIR SKILLS."

Q WHAT STEPS CAN CONTACT CENTERS TAKE TO ENSURE A HIGH QUALITY, WELL-TRAINED WORKFORCE CAPABLE OF DELIVERING EXCELLENCE?

A: Contact centers can build a high quality, well-trained workforce by combining strong people practices with development approaches that reflect how humans actually learn and grow. It starts with career growth pathways, since a lack of advancement remains one of the top reasons agents leave organizations.

One of the most meaningful steps, though, is giving people a safe place to practice and level up their skills. As expectations rise, agents need room to experiment, stumble, and improve without the pressure of a live customer listening on the other end.

That's why simulation-based learning has become such a powerful tool. In our work, we've seen how AI-supported simulations, where learners interact with a realistic avatar customer, create space for authentic practice.

The beauty of this approach is simple: people can make mistakes, learn from them, and try again without fear of judgment. It mirrors the way confidence is built in any craft: through psychological safety to grow at your own pace.

When contact centers combine clear career paths with emotionally intelligent training in safe simulation environments, they create a workforce that is well-trained to deliver exceptional service experiences at every point of contact. 



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.

CONTINUED FROM PAGE 21

- A team huddle to connect, commiserate, and celebrate bolsters the team's energy reserves.
- A coaching conversation that starts with "What's been hardest this week, and what would help?" restores capacity before it develops performance.

You also need to understand what restores each person individually. Some agents need to physically move. Some need to plan. Some need to connect.

...METRICS MIGHT HELP YOU TRACK PRODUCTIVITY, BUT A HEALTHY CALL CENTER IS NOT JUST ABOUT THAT; IT'S ABOUT EFFECTIVENESS.

A standardized wellness initiative won't cover the range of what people need. Take the time to understand what actually recharges each member of your team and then create the micro-conditions that make it possible.

That's not a luxury: *it's workforce management at the level that actually prevents burnout and attrition.*

THE METRICS YOU'RE NOT TRACKING

Agent turnover continues to be high. A recent Deloitte study put the average rate at 38%. SQM estimates that replacing a single frontline agent costs \$20,000, once you account for recruiting, training, and productivity loss during ramp-up.

Those numbers represent a thoughtload crisis masquerading as a staffing problem.

The managers who close that gap understand that dashboards measure workload, not thoughtload.

Those metrics might help you track productivity, but a healthy call center is not just about that; it's about effectiveness.

WORKLOAD MANAGEMENT

Heavy thoughtload is responsible for distracted attention, poor decision-making, emotional reactivity, reduced collaboration, and the slow erosion of your best people.

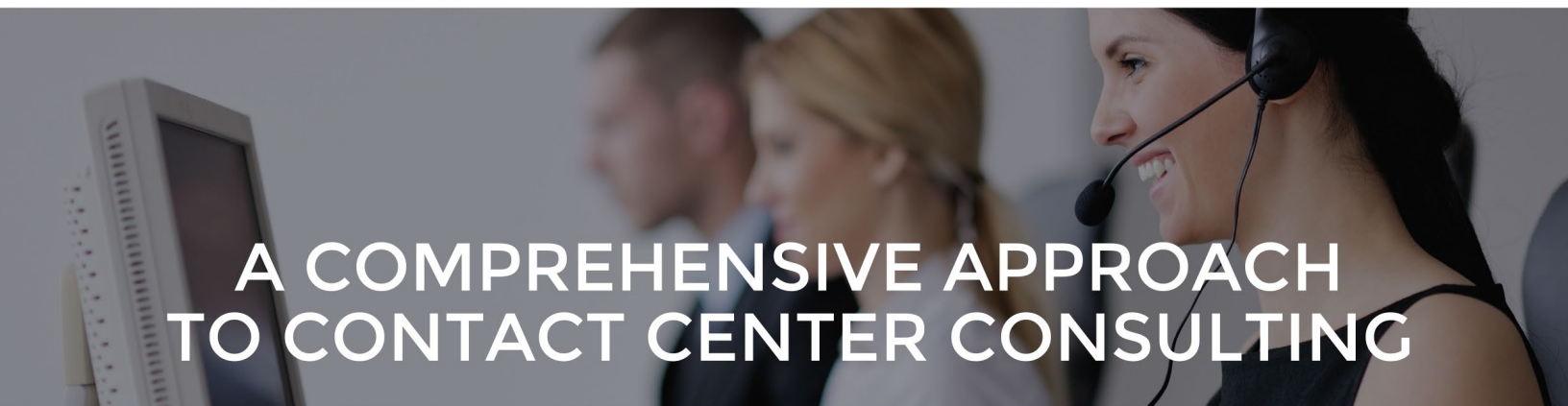


To shrink it, take those steps to help your team focus their scattered attention, process their triggered emotions, and restore their depleted energy. And you will see better metrics, lower attrition, and humans who actually want to come back tomorrow.

That's worth tracking. 



Dr. Liane Davey, the "Teamwork Doctor," is a bestselling author and executive advisor who has spent three decades helping people achieve amazing things together. Her work focuses on tackling the messiest people issues holding teams back, including fostering accountability, promoting healthy conflict, and managing overwhelm. You can reach her on LinkedIn <https://www.linkedin.com/in/lianedavey/>.

A background image showing a blurred view of call center agents working at their stations.

A COMPREHENSIVE APPROACH TO CONTACT CENTER CONSULTING

The outcome you can expect?
High value results driven by your business needs!



Experienced consultants
averaging 25+ years
in the industry



**Practical knowledge of
technology and operations**
including challenges
and keys to success



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tailored to each client's needs
and objectives



Keen strategic insights
to drive business, operations,
and technology plans

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Our fresh approach to contact center consulting



DEFINE

Strategy and Vision
Assessment
Recommendations
Roadmap



PLAN

Requirements
Sourcing Options
Vendor Evaluation
Business Case



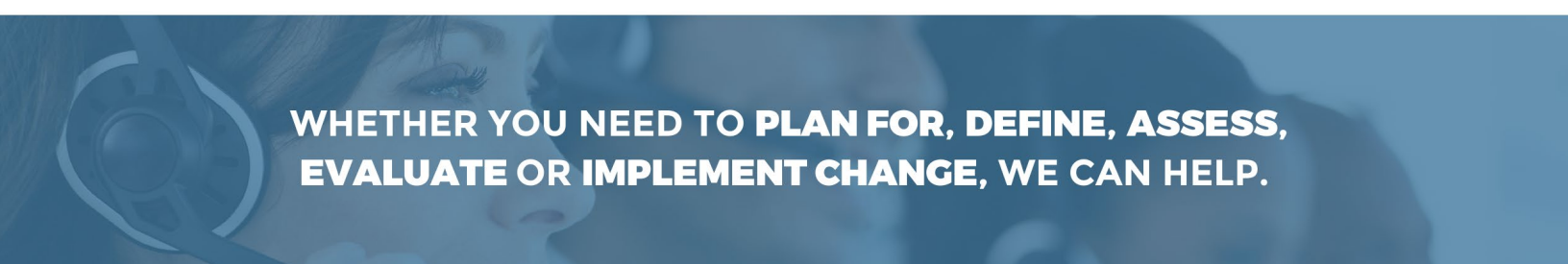
IMPLEMENT

Project Plan
Design/Development
Testing
Pilot and Rollout

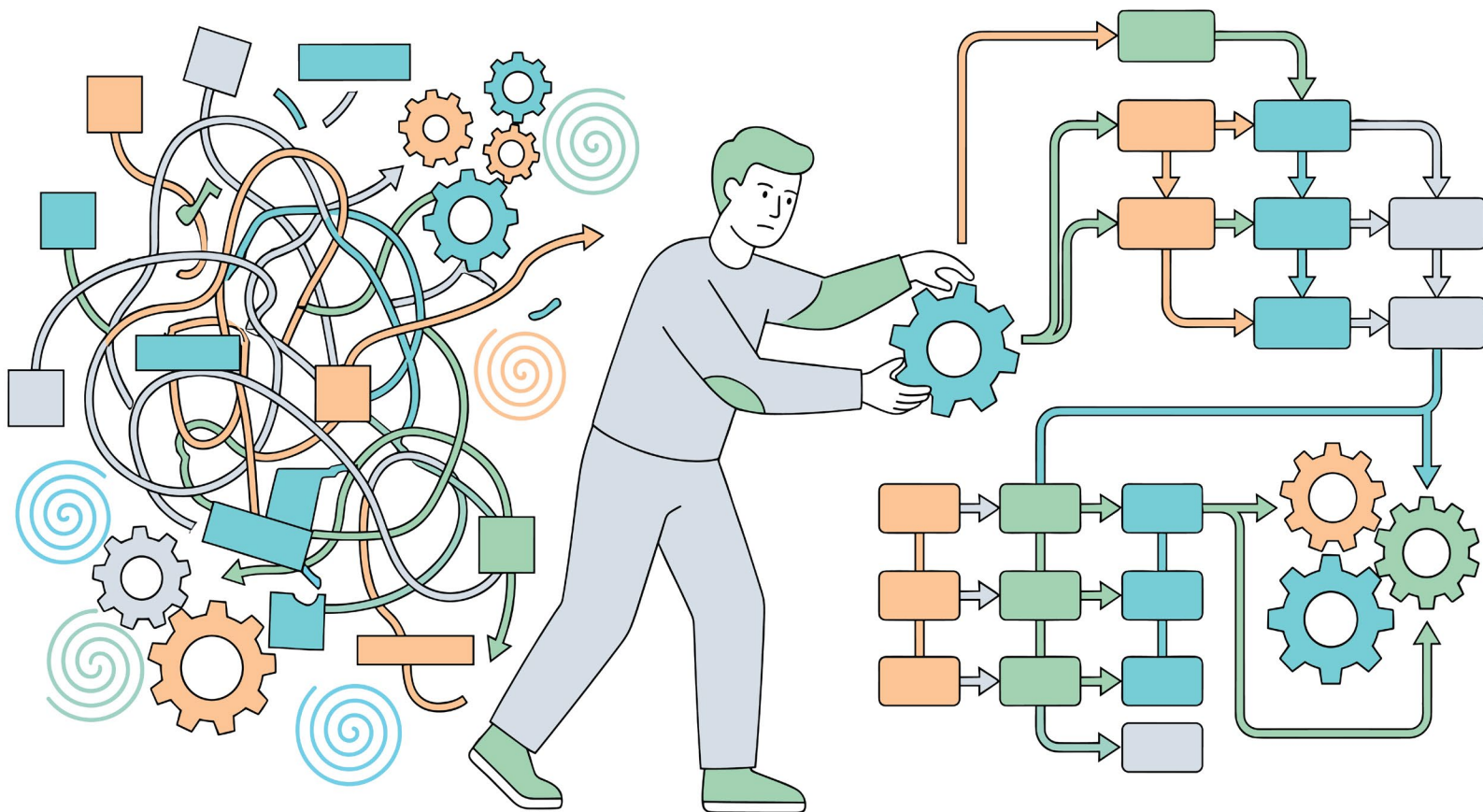


OPTIMIZE

Operations
Technology
Support Models
Monitoring & Management

A background image showing a blurred view of call center agents working at their stations.

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



PLANNING FOR CHAOS? THERE'S A SMARTER WAY.

In workforce management (WFM), there's a tempting idea floating around that if you can't predict the chaos, you can just plan for it.

Some teams overstaff on purpose, building in buffers to cover unexpected absences or schedule changes. If the day runs smoothly, that extra capacity is often redirected to training sessions, coaching, or administrative tasks.

On paper, it sounds smart. But in practice, it's just expensive.

You shouldn't have to overspend to manage volatility. Planning for chaos by adding excess capacity on top of a shrinkage-adjusted forecast is an old-school workaround that belongs to a different era when staffing adjustments were manual, data was lagging, and change was the enemy.

But that's not today. Today, we have better tools and better strategies.

STOP PAYING FOR UNNEEDED CAPACITY

Here's the truth: You don't need more overhead. You need more adaptability.

Forecasting that includes shrinkage is standard and necessary. What I'm challenging is the practice of padding on top of that with "just-in-case" staffing that often goes unused.

That extra cushion comes at a cost: You're paying wages for hours that might never be fully utilized and inflating your labor spend based on what might happen, not on what actually does.

Even a modest staffing buffer can create significant financial drag. A 5% overage in a 200-agent contact center adds the equivalent of 10 additional full-time roles.

Once wages, benefits, and overhead are factored in, that excess easily translates to hundreds of thousands of dollars annually, often without a measurable return.



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In many cases, the added capacity is underutilized, filled with low-value tasks to avoid wasting hours. But repurposing time isn't the same as using it well. Or, in other cases, it is left idle, wasting invaluable resources.

In a contact center environment where budgets are tight and agent performance is under the microscope, overspending for the sake of a safety net quickly becomes a drag on operations.

DISRUPTION HAPPENS. ADAPTABILITY MATTERS

Variance is part of the job. Handle times shift, customers behave unpredictably, and agents call out unexpectedly. That's just the nature of the work.

Then there are ever-present risks of disasters that could overload centers from worried customers and disrupt operations, including severing connections and access, displacing employees, and damaging and destroying facilities.

But instead of trying to forecast every possible disruption, many contact centers are now choosing to build flexible operations that can respond in real time.

Without clear visibility into how demand, staffing, and performance interact throughout the day, it's easy to miss the signs when things drift off course. Traditional planning methods fall short here by preparing you for the expected, not the unexpected.

But modern WFM tools close that gap. They then enable real-time adaptation.

These applications don't rely on perfect predictions. Instead, they monitor live data, identify issues as these arise, and enable smart, timely adjustments.

That might mean offering voluntary time off during a lull, surfacing training opportunities, or shifting resources to other queues.

It's a better way to stay responsive without overspending and it keeps your workforce more engaged.

WHAT REAL-TIME ADAPTATION LOOKS LIKE

Let's say a major storm rolls through a key service region, knocking out power and internet access. Suddenly, your contact center is flooded with a 30% spike in call volume.

If your plan relied on padded forecasts and "just-in-case" staffing, you might have enough agents. That is, if your assumptions were right, and if those agents are actually available.

But with a real-time WFM approach, there's no need to guess. The system flags the surge immediately, analyzes available capacity, and takes action. It might offer voluntary overtime to off-duty agents, reassign break times, reprioritize queues, or reallocate resources from lower-volume channels.

No chaos, no scramble. Just a system built to flex with the day and a team that stays focused, supported, and in control.



DON'T RESIST CHANGE, DESIGN FOR IT

Often, much of the argument for overhead planning is emotional, not operational. It's a way to reduce anxiety by "building in insurance."

But that insurance is costly, and it becomes even harder to justify when better options exist.

What if, instead of viewing unpredictability as a risk to avoid, you designed your operations to handle it?

Think of your workforce strategy as a living system. When conditions change, the system flexes automatically and intelligently.

You don't need extra buffers beyond what's already accounted for because you're not relying on guesswork. You're operating based on what's real.

This kind of responsiveness is more efficient, but it's also more human. Agents want flexibility (also see **BOX**). They want to be able to manage their schedules and adapt when needed. When you give them that control with the right tools, they're more engaged, loyal, and productive.

EMPOWERED AGENTS = BETTER OUTCOMES

Giving agents more control over their time makes a measurable difference. When they can view their schedules and performance anytime and anywhere, volunteer for shifts, or accept changes on the fly, it improves their sense of autonomy.

That autonomy reduces stress, improves schedule adherence, and builds a stronger relationship between employees and their tools.

BOX Adaptive workforce models aren't just better for the business. They're better for the people running it.

RETHINK READINESS AND REDEFINE LEADERSHIP

This is where leadership vision is vital. It's natural to lean on what feels familiar, especially if it has helped you navigate challenges in the past. But in a world that's more dynamic, digital, demanding, and riskier, yesterday's strategies just won't cut it.

Building extra capacity into every plan might feel like a safeguard, but in reality, it's often just leftover thinking from a time when we didn't have better tools.

The leaders driving real progress today are the ones rethinking what operational readiness actually means, and they're doing it by replacing fixed plans with flexible systems.

Being prepared isn't about choosing between accuracy and agility. It's about balancing both. Forecast accuracy still matters, but responsiveness and adaptability are just as important.

The most effective leaders are those building operations that can flex instantly, engage employees meaningfully, and deliver consistent service no matter how unpredictable the day becomes.

Chaos isn't going anywhere. But the ability to manage it without overspending or overplanning is the new competitive edge. 



Nathan Stearns is Vice President, Product Management, Workforce Engagement Management, CX, at NiCE, where he shapes the strategy for workforce optimization solutions including WFM, NPM, ICM, and Back Office. Nathan frequently speaks and writes an omnichannel optimization and partners with customers to align innovation with evolving business needs.



ILLUSTRATION PROVIDED BY ADOBE STOCK

HOW TO PREPARE FOR HOLIDAY FULFILLMENT CHALLENGES NOW

QUALITY MATTERS THE MOST THIS SPECIAL TIME OF YEAR.

September is a defining month for retail contact centers. Holiday promotions are finalized, fulfillment networks are under pressure, seasonal hiring is underway, and customer service leaders are preparing for the surge that follows every major shopping event.

The National Retail Federation expects retail sales to continue to grow this year, reflecting continued consumer demand despite economic uncertainty. Every additional order creates another opportunity to either strengthen or weaken customer loyalty through the quality of customer experience (CX).

Fulfillment is a major part of that experience. While the action in the warehouse determines when customers receive their packages, and the condition they arrive

in, that's not where customers direct their frustration when their delivery is delayed or the package is damaged. They turn to the contact center.

The contact center CX is critical. That's because the quality of those interactions often determines how customers remember the brand long after the holiday decorations come down.

Increasing staffing is one way to prepare for that reality. Contact center operators also need thoughtful use of AI, well-trained agents, and workforce models that can adapt as customer needs change throughout the season.

HOLIDAY FULFILLMENT HAS BECOME A CX ISSUE

Retailers have spent years investing in faster fulfillment and more sophisti-

cated logistics. Even so, peak demand creates conditions that strain even the strongest supply chains. Weather delays, carrier capacity issues, inventory shifts, and last-minute order changes can quickly spike contact volume.

Most customers reaching out to help desks during the holidays are under pressure and trying to solve a problem with a deadline attached.

A delayed gift carries real emotional weight. Customers, very understandably, expect immediate answers and clear next steps, and the contact center is responsible for protecting trust at the most stressful point of the customer journey.



AUTOMATION CAN HANDLE VOLUME WHEN APPLIED THOUGHTFULLY

AI has become an important tool for managing holiday demand. The Liveops 2025 Holiday AI & Customer Service Report found that 78% of shoppers interacted with AI during the holiday season and 85% said automation made service faster or more accessible.

AI performs best for routine interactions such as order tracking delivery updates, return initiation, and frequently asked questions (FAQs). For these tasks, automation cuts down on wait and response times and frees up agents to focus on higher-value conversations.

However, *quality matters as much as availability*. Ultimately, customers want AI that works. Retailers should prioritize accuracy, context awareness, and seamless handoffs over volume.

Transparency is also essential, with 69% of respondents saying that brands should always reveal when AI is being used. Only 22% said that companies clearly disclosed it.

Customers want to know when they're talking to AI and to be given a clear path to a human agent when needed builds trust. Automation should function as a capacity multiplier, not a replacement strategy.

COMPLEX FULFILLMENT PROBLEMS STILL REQUIRE HUMAN EXPERTISE

Unfortunately, too often AI isn't helping to build that trust. Our survey found that 55% of shoppers escalated an AI-assisted interaction to a human agent. But nearly half (45%) said AI failed to understand their problem while 54% believed people ultimately delivered better service.

Complex fulfillment situations require interpretation, empathy, and judgment that automation can't replicate.

For example, customers whose holiday orders arrive damaged or whose gifts miss an important milestone want more than a status update. They need to feel confident that someone understands their situations and has the authority to resolve these matters.

But difficult conversations are rarely governed by standard workflows, and that's where well-trained agents remain essential.

...DIFFICULT CONVERSATIONS ARE RARELY GOVERNED BY STANDARD WORKFLOWS, AND THAT'S WHERE WELL-TRAINED AGENTS REMAIN ESSENTIAL.

SMART CX IS ABOUT FLEXIBILITY

Seasonal planning often centers on headcount, but that's only part of the picture. Fulfillment disruptions create unpredictable demand spikes that static scheduling can't handle. A sudden weather event or carrier delay can generate thousands of customer inquiries within hours.

Flexible customer service models, such as distributed agents and on-demand capacity, allow contact centers to scale support where it's needed without carrying unnecessary overhead throughout the season.

Prioritizing flexibility over raw headcount ensures the right expertise is available when interactions become more complex and emotionally charged.

AI CAN MAKE AGENTS BETTER, TOO

Some of AI's greatest value in the contact center happens behind the scenes. Before an agent joins a conversation, AI can give them shipment history, summarize previous interactions, suggest language, provide compliance guardrails, and draft follow-up notes.

So, instead of spending time gathering information across multiple systems, agents begin each interaction with context already in hand.

This reduces cognitive load, improves consistency, and allows employees to focus on solving problems and making customers feel heard. *AI works best when it's not a replacement for agents, but when it acts as a partner that helps them work better.*

PREPARATION SHOULD EXTEND BEYOND TECHNOLOGY

Technology alone can't deliver a seamless CX. The supporting processes matter just as much.

By now, most retailers have already selected the AI tools they plan to use during the holidays. The remaining work focuses on operational readiness.

Customer journeys should be tested from beginning to end. Escalation paths deserve close attention, particularly for fulfillment scenarios involving delayed shipments, damaged products, or inventory substitutions.

Agents need preparation for AI-assisted workflows alongside coaching on handling emotionally charged conversations. Simulation exercises based on likely holiday scenarios help employees build confidence before contact volumes increase.

Cross-functional coordination also plays an important role. Customer Service, eCommerce, Fulfillment, and Logistics teams benefit from shared visibility into emerging issues so they can respond consistently as conditions change.

THE HOLIDAYS ARE WON AFTER CHECKOUT

Customer loyalty is often determined not by the purchase, but by what happens when something goes wrong.

As retailers enter the busiest months of the year, fulfillment challenges will inevitably generate customer questions. Some interactions will be routine, while others will require thoughtful problem-solving under pressure.

To manage both, contact centers need to combine intelligent automation with skilled agents and flexible schedules. AI is now integrated into holiday operations, but it's not the central character.

The strongest CXs still depend on how well technology, people, and processes work together. Investing in all three allows retailers to reduce customer effort, strengthen trust, and finish the holiday season with stronger relationships than they started with. 🎯



Molly Moore is President and Chief Operating Officer of Liveops and a recognized leader in AI, customer experience and operational transformation. With more than two decades of executive leadership, she guides organizations through complex modernization initiatives balancing innovation with the operational rigor required to scale.



ILLUSTRATION PROVIDED BY ADOBE STOCK

WHY MOST CX TRANSFORMATIONS QUIETLY FAIL

HOW TO PREVENT THAT FROM HAPPENING.

There is a very specific moment in nearly every customer experience (CX) transformation. It usually arrives shortly after go-live.

The project team is exhausted. Dashboards are lighting up screens across the organization. Leaders congratulate each other on the scale of their achievement. Someone finally says what everyone is thinking:

"We did it."

And, for a brief moment, it feels true.

Until the emails start. Until the escalations return. Until supervisors begin quietly allowing exceptions "just this once."

CX transformation rarely fails dramatically.

It fails gradually...operationally...and often invisibly.

Not in steering committees. But in performance reviews. In metric trade-offs. In the small daily decisions that slowly pull organizations back toward what feels manageable.

MANY ORGANIZATIONS APPROACH TRANSFORMATION AS IF IT WERE A CONSTRUCTION PROJECT...BUT CX IS...A PATTERN OF DAILY DECISIONS.

Leaders who spend enough time in contact center operations eventually see this pattern repeat itself. A new platform is implemented. New processes are documented. A new playbook is distributed. *Yet the experience delivered to customers often remains stubbornly familiar...*

THE GO-LIVE ILLUSION

Many organizations approach transformation as if it were a construction project, like a stadium. Once the system is built and the ribbon is cut, attention shifts elsewhere. Improvement is assumed to be secured. But they forget they still have to win games (customers) inside it.

But CX is *not* a structure. It is instead a pattern of daily decisions. Like those a sports team makes.

In modern cloud-based CX environments, the challenge is even more continuous. Platforms now evolve through frequent releases, configuration changes, and expanding capabilities that can subtly reshape workflows after implementation.

Unlike legacy on-premise systems that remained relatively static, today's technology stacks are in constant motion. This means transformation is not only sustained by behavior and governance, but it must also adapt to ongoing technological change.

Within months, recognizable signals begin to emerge:

- Agents begin keeping personal reference materials outside the system.
- Escalations bypass defined workflows.
- Reporting discussions drift away from insights and toward debates about interpretation.

...CX PLATFORMS ARE HIGHLY CAPABLE. WHAT THEY CANNOT RESOLVE ARE UNCLEAR OWNERSHIP STRUCTURES, COMPETING PRIORITIES, OR CULTURAL AMBIGUITIES...

- Teams quietly reintroduce manual workarounds that new designs were meant to eliminate.

Without disciplined ownership, organizations can drift not just because employees create workarounds, but because the experience itself is gradually reshaped by the platform over time.

I once watched a contact center launch a meticulously designed escalation workflow that had taken months to build and test.

Within weeks, agents had created a shared spreadsheet to track exceptions because navigating the new system slowed them down during peak hours. Leadership saw compliance metrics improving. But customers experienced longer resolution times. Yet both realities were technically true.

These behaviors are rarely driven by resistance. They are driven by practicality.

Frontline employees are responsible for delivering outcomes in real time. If a newly designed process introduces friction, they will find ways to remove that friction, *even if that means unwinding the transformation one shortcut at a time.*

WHEN TECHNOLOGY BECOMES THE EXPLANATION

Post-implementation reviews often frame disappointment in technological terms. Leaders may conclude that the system failed to deliver what was expected.

Yet modern CX platforms are highly capable. What they cannot resolve are unclear ownership structures, competing priorities, or cultural ambiguities around decision-making.

Automation is not a solution.

It is an amplifier.

Where clarity exists, automation increases speed and consistency. But where confusion exists, automation accelerates inconsistency.

Organizations frequently underestimate how risky partial alignment can be. Shared dashboards are assumed to create shared truths. In practice, decision rights and accountability structures matter far more than visibility alone.

And here's why. Multiple leaders can review the same journey data and pursue different actions, gradually weakening the consistency transformation was meant to establish.



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THE QUIET RETURN OF HERO CULTURE

One of the earliest indicators that transformation is drifting is the re-emergence of hero culture.

Every operation has individuals who know how to "get things done." They understand informal pathways, maintain relationships that bypass standard processes, and can resolve issues quickly.

Leadership often celebrates these individuals because they are responsive and deeply committed to customers. Yet hero culture frequently develops in environments where designed processes are not delivering reliably.

Each heroic intervention is also a signal: ***the intended experience is not functioning consistently.***

But in organizations where transformation has truly taken hold, customers do not depend on heroes. They benefit from predictability.

HOW METRICS MOVES BACKWARD

Another subtle failure pattern appears in performance management.





Transformations are typically launched alongside experience-focused metrics such as customer effort, first contact resolution (FCR), or successful journey completion.

But over time, operational pressures can pull leadership back toward familiar efficiency measures like handle time, throughput, and queue stability.

This shift is rarely ideological. It is psychological.

Efficiency metrics feel controllable and immediate. Experience metrics feel interpretive and slower to influence. In high-volume environments, controllability tends to win. As priorities quietly change, behaviors follow, and the original intent of transformation begins to erode.

GOVERNANCE IS THE WORK THAT CONTINUES

Sustaining transformation depends less on vision than on governance.

Cross-functional decision forums must continue to operate. Ownership boundaries must remain clear. Policy exceptions must be managed deliberately rather than allowed to accumulate.

But when these disciplines weaken, customers usually feel the consequences long before executives see them reflected in performance reports. They encounter repeated explanations, inconsistent answers, and unnecessary handoffs.

Teams begin protecting customers in slightly different ways. One group may proactively override system controls to expedite urgent orders, while another insists on strict adherence to policy to preserve compliance and queue stability.

Both groups believe they are acting in the customer's best interest. Yet over time, these well-intentioned variations create inconsistent expectations and uneven experiences. Standardization dissolves.

CULTURE MOVES AT THE SPEED OF FAIRNESS

Cultural dynamics play a decisive role in whether transformation endures.

Perceptions of fairness around workload distribution, advancement opportunities, scheduling practices, and employee voice strongly influence adoption. So, when employees believe transformation advantages certain groups more than others, resistance tends to emerge.

This resistance is rarely dramatic. More often it appears as slow adoption, minimal compliance, or selective interpretation of new expectations.

Culture does not always reject change openly.

It simply declines to fully participate.

FROM INITIATIVE TO IDENTITY

Organizations that truly succeed eventually stop referring to transformation as a program. CX then becomes embedded in how decisions are made.

Leadership conversations evolve:

- Instead of focusing primarily on interaction volume, leaders begin asking how many customers were able to resolve issues without needing to make contact.

- Discussions shift away from channel performance and toward sources of friction within the customers' broader journeys.

- Recognition moves from celebrating recoveries to celebrating prevention.

At this stage, transformation has moved from initiative to identity.

And identity is significantly harder to reverse than a project plan.

ENDURANCE IS THE REAL TRANSFORMATION

Most CX transformations do not fail because leaders lack ambition or investment. They fail because leaders underestimate what happens after implementation.

Launching change is visible. Sustaining change is quieter work. It requires governance that continues when attention moves elsewhere, leaders who defend new behaviors under pressure, and operating discipline strong enough to resist the gradual return of what feels familiar.



In the end, transformation is not defined by what an organization launches.

It is defined by what leaders refuse to quietly give back when pressure returns.

Because CX does not deteriorate all at once.

It erodes through a thousand reasonable decisions.

The organizations that truly transform are not the ones that implement the most technology. They are the ones that develop the discipline to hold the line long after the celebration ends.

ORGANIZATIONS THAT TRULY SUCCEED EVENTUALLY STOP REFERRING TO TRANSFORMATION AS A PROGRAM.



Michael Bidwell is a senior customer experience and contact center leader with more than two decades of experience transforming complex, multi-system operations into scalable, customer-ready organizations. Mike focuses on simplifying work for agents while improving trust and outcomes for customers. You can connect with him on LinkedIn at [linkedin.com/in/bidwell76](https://www.linkedin.com/in/bidwell76).

APPOINTMENT SCHEDULING

BY HARSHAL RAUT, NITU JAIN, AND SUBBU SAILAPPAN, INTUIT



ILLUSTRATION PROVIDED BY ADOBE STOCK

WHY HAVE A CALENDAR-FIRST APPOINTMENT PLATFORM? HOW EXPERTS CAN EFFECTIVELY CONNECT WITH CUSTOMERS.

Contact center experts cannot be expected to handle all issues. There are many complex products, services, and topics that require subject matter experts and partner professionals to manage them. That typically means setting up appointments at mutually agreed-on dates, times, and for specific durations.



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Now, booking an appointment looks simple from the outside. A customer chooses a time, an expert shows up, and the session begins.

Inside most contact centers, though, appointments are rarely simple. Over time, the booking layer becomes tied to workforce scheduling, telephony, routing, customer identity, reminders, and reporting.

What starts as a convenience feature quietly becomes part of the operational foundation. When that foundation is tightly coupled, every dependency becomes a potential and costly failure point.

“INSIDE MOST CONTACT CENTERS, THOUGH, APPOINTMENTS ARE RARELY SIMPLE.”

OUR EXPERIENCE

That was the lesson we learned while rethinking appointment scheduling at Intuit.

Our earlier platform had evolved into one of the most rigid parts of the customer-to-expert journey. It duplicated schedules across systems, embedded contact center assumptions deep inside booking logic, and put meeting connections on the critical path of appointment creation.

The consequences were concrete. 1:1 appointments defaulted to 60-minute slots, even though most ran under 30 minutes, effectively halving each expert's bookable capacity and the revenue that capacity could generate.

Meanwhile, blanket booking limits, intended to protect experts' time, had the opposite effect: experts hit them quickly and resorted to scheduling in their personal calendars. This created shadow availability that workforce management (WFM) forecasting and utilization reporting could not see.

The downstream effects showed up as inconsistent availability for customers, onboarding friction for new experts, and avoidable missed appointments.

We then rebuilt the platform around a different idea: **the calendar should be the source of truth.**

That shift did more than simplify scheduling. It created a foundation that could support both workforce-managed experts and independent professionals. It also enabled pooled and one-to-one bookings while separating appointment creation from downstream connection workflows.

The results were meaningful. As we will expand on later in this article, we experienced a large increase in appointment bookings while the number of missed appointments fell. And, perhaps most importantly, we enabled our experts to work more efficiently and productively.

For contact center leaders, the takeaway is straightforward: if your appointment system is still treated as a feature rather than a platform, it may be limiting growth and reliability.

THE HIDDEN COST OF "GOOD ENOUGH" SCHEDULING

Older appointment systems rarely stay simple for long. A team needs a booking flow, so one is added to an existing workforce or routing stack. Then come reminders, expert selection, meeting setup, and special handling for new services.

Each step makes sense on its own. Over time, though, the system becomes harder to understand, change, and scale.

We saw four recurring problems:

1. Schedule drift

Multiple systems held overlapping versions of expert availability. A WFM system might show an expert as available while the appointment system showed them as blocked.

Those inconsistencies surfaced directly in customer experience (CX) as offered slots that could not actually be fulfilled.

2. Scaling friction

Making an expert eligible for appointments required manual, per-expert setup. That may be manageable for a small team. At scale, it becomes an administrative burden that slows expansion and adds ongoing cost.

3. Poor externalization

The original architecture assumed a bookable expert was an internal worker with a workforce account and internal setup. That made it difficult to extend scheduling to independent professionals or external customer-facing use cases.

4. Operational fragility

Booking and connection setup were too tightly linked. If a downstream meeting component failed, the booking flow itself could fail.

That is the wrong failure mode. A customer should not lose an appointment because a downstream integration is temporarily degraded.

These issues are common in contact centers because appointments sit at the intersection of CX and operational control. The more important the appointment channel becomes, the more visible those architectural weaknesses become.

...IF YOUR APPOINTMENT SYSTEM IS STILL TREATED AS A FEATURE RATHER THAN AS A PLATFORM, IT MAY BE LIMITING GROWTH AND RELIABILITY.

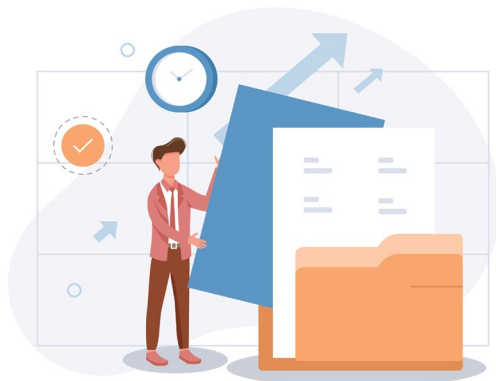
THE CALENDAR-FIRST SHIFT

We redesigned the platform around one principle: each expert has one authoritative calendar, and every system that needs availability reads from it.

In the old world, the truth about availability was scattered across systems. In the new world, the calendar owns that truth. Shifts, breaks, appointments, personal blocks, and synchronized external events are all resolved in one place.

That required separating responsibilities into four domains:

- **Calendar management became the system of record.** It stores events and availability details and reflects what is actually bookable.
- **Booking management acts as the policy gate.** Any request to place an event on a calendar must go through it. That is where duration rules, lead times, buffers, and product-level policies are enforced.
- **Schedule management handles workforce-specific concerns.** It validates shifts, labor rules, and scheduling policies, then materializes approved schedule details into the calendar.



APPOINTMENT ARCHITECTURE IS NOT JUST A BACK-END IMPLEMENTATION DETAIL; IT DIRECTLY SHAPES RELIABILITY, EFFICIENCY, AND CX.

- **Coverage management provides aggregate capacity views across groups of experts.** That is what makes pooled appointments possible without tying staffing logic directly to the booking interface.

This structure did not eliminate complexity, but it moved complexity into clearer boundaries. In large service systems, complexity is not the real enemy. Hidden coupling is.

WHY SEPARATING BOOKING FROM CONNECTION MATTERS

One of the most important design changes was separating appointment creation from session orchestration.

In many older systems, booking and meeting setup are effectively treated as one transaction. That creates a brittle dependency chain. If the system cannot provision the downstream connection immediately, the appointment itself can fail.

We moved to an event-driven model instead. Booking writes the appointment to the calendar and emits an event. Connection services, reminders, and notifications consume that event asynchronously.

The change sounds subtle, **but the operational impacts are significant:**

- Booking remains reliable even when downstream systems are degraded.
- Customers can still reserve time.
- Engineering teams can evolve connection workflows more safely.
- Support teams can reason about failures more clearly because the booking paths are no longer entangled with every downstream dependency.

For contact centers, this matters because the channel stack is always evolving. Routing, telephony, reminders, and session services all change over time. *Booking should not be held hostage by every integration downstream.*

TWO BOOKING MODELS, ONE PLATFORM

Modern service organizations rarely operate with a single workforce model. Some experts are fully workforce-managed. Others are independent professionals or partners who control their own schedules. A useful appointment platform has to support both.

In a one-to-one appointment, the customer chooses a specific expert. The platform computes availability from that expert's calendar, applying rules such as duration, lead time, and any other relevant booking constraints.

In a pooled appointment, the customer chooses a time, not a person. The system fulfills that appointment from a qualified pool based on availability, staffing, and skill rules.

This requires a different supply model. Instead of asking when one expert is free, the platform asks how much capacity exists for a particular service in a given time bucket.

This is where coverage management becomes essential. It maintains aggregate views of supply so customers only see appointment slots the organization has confidence it can fulfill.

Supporting both models on the same calendar-first foundation gave us flexibility without multiplying platforms. Workforce-managed experts could still operate under scheduling policies, while other experts could expose availability through the same booking framework.

WHAT WE LEARNED

A few lessons stood out during the redesign.

Complexity is not the enemy; hidden coupling is. Once responsibilities were separated into clearer boundaries, we could evolve parts of the system without destabilizing the whole.

Architecture directly affects capacity. Moving away from rigid 60-minute appointments and introducing flexible durations effectively created capacity without adding headcount.

Availability is the heartbeat of the platform. Centralizing availability into one source of truth removed the schedule drift that had previously undermined customer confidence and operational predictability.

These lessons reinforced a broader point. Appointment architecture is not just a back-end implementation detail; it directly shapes reliability, efficiency, and CX.

WHAT CHANGED IN PRACTICE

The results of the redesign were measurable.

1. Appointment bookings increased 367% year-over-year

A major reason was the shift away from rigid default durations. In many older systems, every appointment is treated as a 60-minute block because fixed lengths are easier to manage. But many customer interactions do not actually need 60 minutes.

When the platform began supporting shorter, more flexible durations, capacity expanded significantly without hurting the CX.

2. Our experts were able to be more productive

That flexibility in the new system recovered more than 58,000 expert hours in a single quarter.



3. Onboarding improved as well

By replacing manual, per-expert setup with system-level rules, the platform eliminated roughly 1,000 hours of administrative work each year.

4. Reliability improved too

Missed appointments fell by 39%, telephony-related failures dropped by approximately 8%, and notification delivery improved from 54% to 88%.

These gains came from two core architectural decisions: centralizing availability truth and keeping booking off the critical path for downstream session setup.

5. The redesign also created a path to broader externalization

It now enabled appointment booking to be offered to all QuickBooks Online subscribers as a capability they could extend to their own end-customers. The platform no longer assumed that every bookable expert had to fit an internal workforce model.



LOOKING AHEAD

The future of contact center appointments is not just better slot selection; it is better matching.

- Which expert is most likely to resolve a customer's issue?
- Which interactions should become appointments rather than real-time conversations?
- When should the system recommend a follow-up session, and with whom?

Those capabilities depend on a reliable operational foundation. Without clean availability data, resilient booking, and a platform that can support multiple workforce models, higher-order intelligence remains fragile.

That is why appointment infrastructure deserves more attention than it often gets. In expert-led service environments, it is not just a scheduling tool. It is the coordination layer that determines how efficiently customers connect with the right expertise.

When that layer is tightly coupled, growth becomes harder and reliability suffers. When it is designed around a clear source of truth and clean boundaries, the gains show up across capacity, CX, and operational resilience.📌



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AGENT PERFORMANCE

BY DINA VANCE, ULYSSES LEARNING



ILLUSTRATION PROVIDED BY ADORÉ STOCK

THE ILLUSION OF COMPETENCE

WHY KNOWLEDGE ALONE DOES NOT DRIVE PERFORMANCE.

In many contact centers, persistent performance challenges are often attributed to gaps in knowledge. Yet, a closer look at coaching conversations reveals a strikingly consistent observation: agents already know what to say. They have completed training, passed assessments, and demonstrated familiarity with the conversation skill requirements and processes.

On the surface, this suggests a well-prepared workforce. And still, performance remains inconsistent. As an industry, we continue to work to reduce escalations and repeat calls while improving our overall voice of the customer scores.

This contradiction reflects a deeper reality. The issue is not a lack of knowledge. Instead, it suggests it is the inability to consistently apply that knowledge when it matters most.

Recently, a senior leader in a contact center described a situation that illustrates this challenge clearly. After investing 12 weeks in comprehensive training, their agents had successfully completed certification and demonstrated strong knowledge proficiency in controlled environments.

However, when those same agents transitioned to live customer interactions, performance broke down almost

immediately. Even the most basic calls became difficult to manage. Agents hesitated, lost their flow, and frequently escalated interactions that should have been resolved independently.

The leader's frustration stemmed from a fundamental realization that despite extensive training, agents were not prepared for the unpredictability of real-world conversations. They knew the material well enough; however, they did not yet know how to think with it.

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DONT MISS OUT!

THE ILLUSION OF COMPETENCE

By Dina Vance

Great article on why knowledge alone does not drive performance.

Contact Center Pipeline

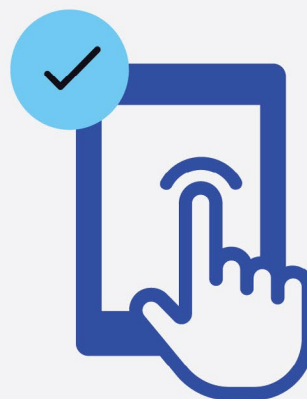
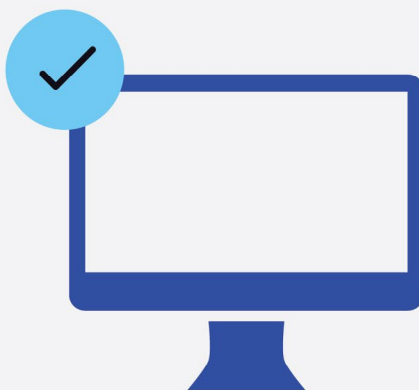
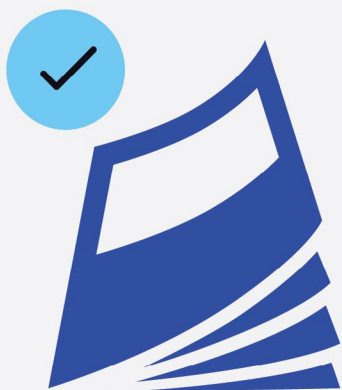


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