OCTOBER 2026

Contact Center Pipeline

REAL ANSWERS FOR REAL CX QUESTIONS

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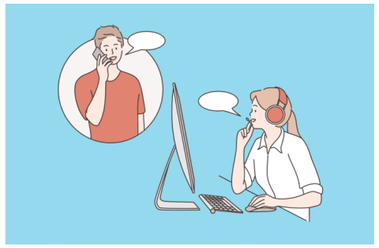
THE TOP 5 BLOG POSTS ON BLOG.CONTACTCENTERPIPELINE.COM

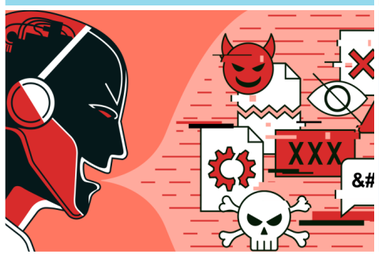
EXCLUSIVE CONTENT FROM OUR TEAM OF CALL CENTER EXPERTS
NEW POSTS EVERY WEEK (TUESDAY – THURSDAY)

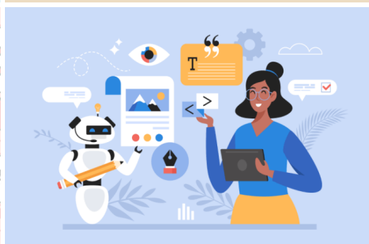
Why Platform Integrity Matters
BY RACHEL LUTZ GUEVARA
https://bit.ly/4yhgckq

The U.S. – Canada Compliance Gap
BY GEOFFREY BLANC
https://bit.ly/4ycLwAD



CCP BLOG'S TOP 5 MOST POPULAR POSTS FROM SEPTEMBER





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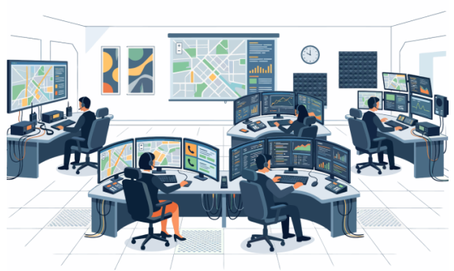
When the Voice Isn't Human
BY RANA GUJRAL
https://bit.ly/4yiZ7Xs

Ensuring Reliable AI Applications
BY ANKUSH GANGWANI
https://bit.ly/4hnxYLo

How 9/11 Changed Contact Centers

Q&A WITH THE CCP ADVISORY BOARD

Today 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.
https://bit.ly/4yYuDKc



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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

45%

According to ServiceNow research that surveyed more than 34,000 executives, service professionals, and customers globally, service reps spend just 45% of their time on actual customer issues.

SOURCE
CRM:
IS LEGACY CRM HOLDING YOU BACK?
By Michael Ramsey
#CRM

34%

Only 34% of executives report significant progress on building a genuinely connected enterprise approach, and that number explains why so many AI investments in the contact center are underperforming.

SOURCE
CRM:
IS LEGACY CRM HOLDING YOU BACK?
By Michael Ramsey
#CRM

80%

80% of reps must toggle between three to five systems just to resolve a single issue.

SOURCE
CRM:
IS LEGACY CRM HOLDING YOU BACK?
By Michael Ramsey
#CRM

10-20

Every dollar invested in a well-designed VOC program typically returns 10–20 times the ROI of the same dollar invested in direct customer service.

SOURCE
VOICE OF THE CUSTOMER:
ENHANCING THE VOC PROCESS – PART 1
By John Goodman, with Thomas Hollmann, Bill Price, and David Beinhacker
#VOICEOFTHECUSTOMER

87%

87% of customers say phone calls are their preferred communication channel. With that, 46% say their biggest concern with AI chatbots is their inability to fully understand their questions or concerns.

SOURCE
CRM:
IS LEGACY CRM HOLDING YOU BACK?
By Michael Ramsey
#CRM

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FROM THE PIPELINE

HAPPY CUSTOMER SERVICE WEEK

It is time to celebrate our industry's biggest holiday: Customer Service Week. It is a great opportunity to celebrate our people who wow our customers and enhance our brand. What a rewarding and energizing week.

Don't let it be a once-and-done event, though, right? Let's carry our messages, feelings of gratitude, and thankfulness forward through the year. It would be a missed opportunity if we put away the decorations and special recipes and we didn't carry forward our celebrations.

Have a great week in October... and 51 more weeks after that to celebrate our people!

Linda Harden

LINDA HARDEN
Publisher
Contact Center Pipeline

CUSTOMER SERVICE WEEK

BY MARK PEREIRA

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THE EXTRA MILE HAS RULES

HOW TO BEST SET THEM UP AND FOLLOW THEM.

CRM

BY MICHAEL RAMSEY

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IS LEGACY CRM HOLDING YOU BACK?

HERE'S WHAT TO DO ABOUT IT.

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BY BRENDAN READ, CONTACT CENTER PIPELINE; INTERVIEW WITH EARL E. SMITH JR., HOME TELECOM

HOME IS WHERE THE CX IS

HOW HOME TELECOM TRANSFORMED ITS BUSINESS.

ILLUSTRATION PROVIDED BY ADOBE IMAGES

Home is where the connections begin and are the most important: with family members, loved ones, and friends. Connections that then extend into the broader community, like for business/work, education, services (e.g., financial, government, healthcare), shopping, and entertainment.

Home Telecom, headquartered in Monck's Corners, South Carolina (north of Charleston), has been enabling such connections since its founding in 1904.

The company is a locally-owned telecommunications provider that connects residential and business customers throughout Berkeley, Charleston, and Dorchester counties with high-speed internet, voice, video, managed Wi-Fi, security solutions, and business communication services.

Home Telecom's customers range from residential subscribers and remote workers to small businesses, enterprise organizations, healthcare providers, educational institutions, and government agencies.

EARL E. SMITH JR.

"For more than 120 years, our mission has remained centered on delivering exceptional service while being 'the easy-to-do-business-with company'," says Earl E. Smith Jr., Home Telecom's Director of Customer Experience.

To learn more about how Home Telecom serves and supports its customers and builds and maintains their loyalty, we had a virtual conversation with Earl. We also discussed the company's service challenges, how it overcame them, and its next steps for the future.

Q HOW DO YOU SERVE YOUR CUSTOMERS? WHICH CHANNELS, INCLUDING AUTOMATED AND LIVE AGENT, DO YOU USE TO ENGAGE WITH THEM?

A: Our Customer Care organization supports customer service, basic troubleshooting, billing inquiries, account management, retention, sales, and support for our customers, utilizing our security and connected home solutions (also see **At A Glance**).

Customers engage with us through multiple channels, including:

- Voice interactions through our contact center
- Online self-service tools
- Customer portal and mobile applications
- Email forms
- Web chat
- Retail store locations
- Field service interactions

I think in today's environment, it's important to understand the wide range of everyday consumers that any organization may interact with.

While some industries have the luxury of catering to one generation or another, that simply isn't the case in the telecommunications industry. Everyone needs the ability to connect in some shape or form.

So as the provider that makes that possible, the question becomes how to do that in a way that caters to all ages and lifestyles.

As customer expectations continue to evolve, we have focused on creating a seamless customer experience (CX) across channels while increasing self-service capabilities that allow them to resolve issues on their own schedules.

Q OUTLINE ANY CHALLENGES YOU HAVE FACED

A: I will say some of the biggest challenges from the customer service perspective were too many manual processes and inefficiencies, which caused service level challenges.

When I was a kid, my mother used to work for C & P Telephone Company, which is one of the predecessors of Bell Atlantic that subsequently became a part of Verizon.

One of the things I remember her telling me was how everything from order taking to repair requests had to be handwritten and telegraphed/intraoffice-mailed to the appropriate departments to have the work done.

While we were not telegraphing order forms when I joined Home Telecom, in 2022, we were still taking paper orders and later entering them into the system. This alone cut our productivity in half.

We also used many different applications with single monitors which, as someone who started as a service rep himself, not only understood how much time it wasted, but simply made the end-user experience daunting to say the least.

After observations, it became clear that the billing system we then had in place simply was not efficient enough to allow us to enter orders in real time while on the phone with customers.

We also had to call or email other departments to get basic information, such as if our customer was exceeding their bandwidth or whether we could service a specific address.

AT A GLANCE

HOW MANY AGENTS DO YOU HAVE?

- 15 Contact center representatives
- 10 Retail representatives
- Total customer-facing team: 25

WHAT IS YOUR CONTACT VOLUME?

- Approximately 15,000 customer interactions per month

WHAT IS THE SPLIT BETWEEN INBOUND AND OUTBOUND?

- 90% inbound
- 10% outbound

WHAT IS THE SPLIT BETWEEN INBOUND CHANNELS?

- Voice calls: ~78%
- Walk-in retail interactions: ~10%
- Email forms: ~10%
- Web chat: ~2%

Email volume continues to decline as adoption of online self-service tools increases.

ARE YOUR AGENTS IN-HOUSE OR OUTSOURCED?

- The majority of customer interactions are handled by in-house teams.
- It utilizes a trusted vendor partner to provide overflow support during periods of peak demand.

HOW MANY AGENTS ARE ON-PREMISE AND HOW MANY ARE REMOTE?

- Contact center team: 100% on-premise
- Retail teams: 100% on-premise

WHERE ARE YOUR CONTACT CENTERS AND AGENTS LOCATED?

- Contact center: Moncks Corner, South Carolina
- Retail locations: Four stores located throughout Berkeley, Charleston, and Dorchester Counties

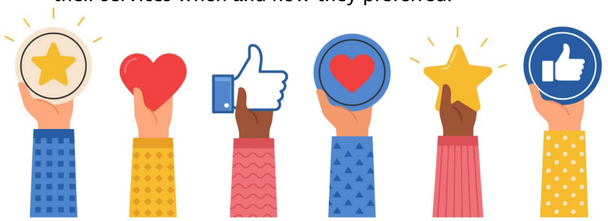
WHAT ARE THE KEY CONTACT CENTER TECHNOLOGIES THAT YOU USE?

- CDG MBS (Elements) Billing and Customer Management Platform
- GoCare Customer Experience Platform
- Calix Cloud
- My Contact Center and IVR Platform
- Customer Portal and Digital Self-Service Tools

With a small customer service team, it is critical to be as efficient as possible in order to maximize productivity.

But as our subscriber base continued to grow, we recognized an opportunity to simplify both CX and many of our internal business processes. Customers increasingly expected digital self-service options, faster issue resolution, and greater visibility into their accounts without needing to contact us directly.

At the same time, we wanted to remain true to our mission of being the easy-to-do-business-with company. To achieve that, we needed better automation, more streamlined workflows, and tools that would empower customers to manage their services when and how they preferred.



Q WHAT STEPS DID YOU TAKE?

A: After a few weeks of watching and learning how we operated it was clear that some things needed to change, with the understanding it couldn't all happen at once. Call volume suggested we needed to increase the size of the team, but before that we had to eliminate as much inefficiency as possible.

Reducing after-call work (ACW) offline time for order entry was the first area of focus. Every minute we spend in wrap-up is a minute we are unavailable to service our customers.

While we still use this time when necessary, our improved ability to multitask has helped us reduce our ACW to less than 50% of what it was before.

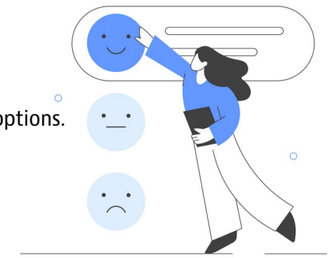
Next, we upgraded the call center with dual monitors at each workstation, which in itself was a great improvement. With the work we do, we often use many different applications and/or webpages within a single customer interaction.

When you have one screen, having to click back-and-forth between windows takes up time. But when you have two screens, you can have more windows open in front of you at the same time. Now that my team also has laptops, we even have some that use the laptop screen as a third monitor.

Although each of these changes helped us improve simply by putting focus where it was needed, the true improvement came when we switched billing systems. That occurred beginning in 2023 as part of an overall evaluation of how technology could help us automate routine processes, modernize our operations, and better support our long-term growth strategy.

To accomplish this, we embarked on a significant business transformation initiative that included implementing a new billing and customer management platform, expanding self-service capabilities, and providing employees with better tools to support customers.

Our goals included:



- Simplify customer interactions.
- Increase customer self-service options.
- Reduce manual processes.
- Improve operational efficiency.
- Create a more seamless CX.

MAINTAINING CUSTOMER (AND AGENT) CONNECTIONS

BOX

Maintaining continuous and reliable connections is critical for all organizations, including when disasters threaten and strike. But especially so for "last-mile" telecommunications companies that provide those vital links to homes and businesses.

So, we asked Earl E. Smith Jr., Home Telecom, "How does your company enable business continuity and disaster response for your customers and employees, like your contact center agents? Also, how do you keep them informed of what is happening and next steps?"

"When it comes to disaster response and/or business continuity, the easiest thing I can say is we are going to get it done," says Earl.

"Our operations team starts planning and preplanning from the very moment we know that there is a possibility that we could be impacted by a disaster.

"Even for those situations where it isn't something you can prepare for, we have an extensive set of guidelines that tell us what needs to happen and who the parties responsible are.

"It doesn't matter if we have to have planning calls at 5 in the morning or 10 at night; we plan ahead so that we can be safe and be prepared to provide our consumers the quality of service they expect."

Home Telecom has also invested tens of thousands of dollars to enable its customer service and support teams to be able to work remotely in the event it is not safe to travel. Or like when school and daycare closures have put its team members in a bind that prevents them from making it into the office.

"As soon as we know there is a chance of an event, we advise our frontline teams to take home their laptop bags and necessary equipment to be able to work remotely if needed," says Earl.

Before Home Telecom determines whether to have its teams return to regular operations, it has team members, even its top leadership, who check roadways as well as its structures.

"I literally mean all the way up to the top," says Earl. "We have actually been on conference calls while even our COO and VPs are out surveying the area. It's things like this that I think truly set Home Telecom apart and make it a great place to work."

- Equip employees with better visibility into customer services and support needs.
- Support continued subscriber growth without proportional increases in contact volume.

Every decision was evaluated against our mission of being the easy-to-do-business-with company.

Q WHAT SUPPLIER(S) DID YOU CHOOSE AND WHY?

A: We selected several strategic technology partners to support our transformation initiative.

- CDG's MBS platform (now known as Elements) became our new billing and customer management system, providing enhanced automation capabilities and a modern foundation for future growth.
- We also implemented GoCare to expand customer self-service options and improve the digital CX.

Additionally, we further integrated Calix Cloud into our customer support operations. While it was already utilized within our Tier 2 network operations center (NOC), expanding its use provided customer service representatives with greater visibility into customers' Wi-Fi performance, connected devices, and usage trends.

Together, these platforms are aligned with our goals of improving efficiency, increasing automation, and enhancing CX.

Q OUTLINE THE IMPLEMENTATION, INCLUDING WHEN AND STEPS TAKEN, INCLUDING CUSTOMER EDUCATION AND CONTACT CENTER TRAINING.

A: Once we selected Elements, most of 2024 was spent designing workflows, organizing data, going over configuration requirements and training.

There were points where meetings were weekly, and right up to crunch time, daily. I'll tell you one thing: I don't think I've ever seen a group of people so dedicated to one cause.

Don't get me wrong. There were periods of frustration and uncertainty, but right down to go-live (which ended up amid a snowstorm in January 2025: that has only happened in Charleston maybe two-three times in the 12 years I've lived here), our team put in a lot of long hour days to make sure we got it right.

One of the most important early steps was ensuring MBS and GoCare were properly configured to support our specific business processes and customer requirements. This required extensive planning sessions and collaboration between operational leaders, technology teams, and our vendor partners.

Training was equally critical to success. While Calix Cloud was already familiar to our Tier 2 NOC team, it represented a new toolset for many members of our customer service organization. Training focused on helping employees leverage customer insights, like from their bandwidth usage and devices. We invested months in preparation through:

> ***"CUSTOMERS INCREASINGLY EXPECTED DIGITAL SELF-SERVICE OPTIONS, FASTER ISSUE RESOLUTION, AND GREATER VISIBILITY INTO THEIR ACCOUNTS..."***
> ***-- EARL E. SMITH JR.***

- Classroom training
- Hands-on learning sessions
- System simulations
- Process documentation
- Internal communications
- Development of subject matter experts who could provide ongoing support after deployment.

Maintaining strong communication throughout the process helped build confidence and secure buy-in from frontline employees, which proved essential to a successful transition.

We also dedicated significant effort to customer education by communicating upcoming changes, promoting self-service capabilities, and helping customers understand the benefits of the new tools available to them.

Q WHAT, IF ANY, OBSTACLES DID YOU ENCOUNTER, AND HOW WERE THEY MANAGED?

A: The greatest challenge was managing the volume of change occurring simultaneously. Implementing a new billing platform, customer-facing tools, and operational processes represented a significant shift for both employees and customers.

Having experienced billing system conversions in previous roles, I understood that no implementation is ever perfect on day one. Despite extensive planning and testing, there were naturally areas that required refinement once the systems were live.

We addressed these challenges through:

- Frequent communication.
- Rapid issue identification and resolution.
- Ongoing employee feedback.
- Additional training sessions.
- Process adjustments and system fine-tuning.

We also closely monitored customer contact patterns and made operational adjustments to help manage temporary call spikes during the transition period. By remaining flexible and responsive, we were able to work through challenges while maintaining service levels and supporting our customers.

Q YOU MENTIONED RETAIL AND FIELD SERVICE. DID YOU HAVE ANY CHALLENGES CONNECTING THEM WITH THE CONTACT CENTER: ENSURING SEAMLESS EXPERIENCES? AND IF SO, HOW WERE THESE SPECIFIC ISSUES OVERCOME AND STREAMLINED?

A: In October 2023, retail and customer service teams were aligned under one manager. I think this decision has made us more agile. The two departments have several overlapping tasks, so it was best to ensure we are all doing things the same way, receiving the same message, the same training etc.

Here's one of the core issues: our customer service and retail departments had no real understanding of what our field services team did.

To overcome that challenge, we arranged to have each member of Retail and Customer Service go into the field to see an install from beginning to end. This enabled them to understand what the customer should expect and gave them the confidence to better speak about our products.

Q WHAT WERE THE OUTCOMES OF YOUR CHANGES/IMPROVEMENTS AND HOW DID THESE ALIGN WITH YOUR GOALS AND OBJECTIVES?

A: The results have been nothing short of a success story. Despite continued subscriber growth, we have successfully reduced overall contact volume while simultaneously improving operational efficiency.

By automating manual processes and expanding self-service capabilities, we have enabled customers to complete many routine transactions without requiring assistance from an agent.

Key outcomes include:

- Significant reduction in manual processes.
- Increased customer adoption of self-service capabilities.
- Reduced contact volume despite subscriber growth.
- Improved visibility into and enhanced CX.
- Better tools for frontline employees.
- Greater operational efficiency.
- Truck rolls reduction.

Most importantly, these improvements have caused Home Telecom to continue growing while maintaining the high level of service our customers expect and deserve.

Q WHAT ARE THE NEXT STEPS FOR HOME TELECOM?

A: Our focus remains on continued growth and continuous improvement. We will continue expanding our fiber network, enhancing digital experiences, increasing customer self-service capabilities, and identifying opportunities to further simplify interactions for both customers and employees.

As customer expectations evolve, we remain committed to investing in technologies and processes that support our mission while maintaining the personalized service that has defined Home Telecom for more than 120 years.

Q WHAT ARE YOUR RECOMMENDATIONS FOR ORGANIZATIONS AND CONTACT CENTERS FACING SIMILAR CHALLENGES?

A: My recommendation is to begin with a clear understanding of your CX goals and work backwards from there.

Technology alone does not solve business challenges. Success comes from aligning people, processes, and technology around a common objective.

> ***"THE RESULTS HAVE BEEN NOTHING SHORT OF A SUCCESS STORY. DESPITE CONTINUED SUBSCRIBER GROWTH, WE HAVE SUCCESSFULLY REDUCED OVERALL CONTACT VOLUME WHILE SIMULTANEOUSLY IMPROVING OPERATIONAL EFFICIENCY."***

I would recommend organizations:

- Focus on CX first.
- Invest adequate time in planning and configuration.
- Communicate frequently throughout the project.
- Involve frontline employees early.
- Develop internal champions and subject matter experts.
- Expect adjustments after go-live.
- View implementation as a journey rather than a one-time event.

Most importantly, remember that technology should support your employees and customers, *not* complicate their experience.

The organizations that achieve the greatest success are those that embrace change while maintaining a relentless focus on serving their customers.

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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Contact Center Pipeline

BY MARK PEREIRA

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THE EXTRA MILE HAS RULES

HOW TO BEST SET THEM UP AND FOLLOW THEM.

This year's Customer Service Week theme is "The Extra Mile." It's an admirable cause, and something every agent and contact center leader should want for their team.

But have we really considered what going the extra mile means in practice?

- Sometimes it looks like an agent staying on the line for 15 minutes while a caller digs up their child's Social Security number for authentication.
- Sometimes it's calling three different transportation providers to help a member get a ride to tomorrow's doctor's appointment.

Both feel like these are the right things to do.

But the extra mile can also look like an agent relaxing company protocol to help a caller, skipping an authentication step, or waiving a costly same-day shipping fee.

Some of that may sound harmless. But some of it can quietly backfire on your business.

That's the problem with celebrating "the extra mile" without defining it. When agents are expected to go above and beyond without a clear sense of what's okay and what isn't, friction follows.

- Callers start expecting fees to be waived every time.
- Agents holding the line for 15 minutes stack up calls behind them, and callers waiting get frustrated and take it out on the next agent who picks up.
- In the worst cases, loose protocols open the door to bad actors: identity thieves probing for a way in, or phishing attempts disguised as a routine request.

> ...HAVE WE REALLY CONSIDERED WHAT GOING THE EXTRA MILE MEANS IN PRACTICE?

So how do we go the extra mile without handing a stranger the keys to your company's vault?

START WITH THE MINDSET

Mother Teresa once said, "We can't all do great things, but we can do small things with great love."

That's a good way to think about service excellence. It's rarely the big, heroic gesture that wows a customer on a single call; creating that kind of moment on every call, for every agent, is hard to sustain. It's the accumulation of small things, done consistently, and done well. Such as:

- Playing pleasant hold music.
- Using the CRM software to gather up-to-date information on the customer.
- Setting and complying with hold time limits.
- Practicing greetings and closings until the tone feels warm and genuine; the kind that makes a customer comfortable calling back if they need to.

None of these actions look like "the extra mile" on their own. But together they shape whether an agent has the time, tools, and support to deliver something great, or whether they're set up to struggle before they even log in for their shift.

BUILD IT IN, DON'T LEAVE IT TO CHANCE

Above-average service isn't an accident, and it isn't just a matter of hiring people with the right attitude and hoping for the best. It's a deliberate design choice, built across four main areas.

1 *Ensuring Products That Meet Customers' Expectations*

The company's offering(s) has to hold up. When they don't, that's when the understandably disappointed and frustrated customers call in.

No amount of agent goodwill can make up for a product that fails on the basics, and when a company knows about the failure and doesn't fix it, the burden lands squarely on customer service.

> ABOVE-AVERAGE SERVICE ISN'T AN ACCIDENT, AND IT ISN'T JUST A MATTER OF HIRING PEOPLE WITH THE RIGHT ATTITUDE AND HOPING FOR THE BEST.

Last December, I ordered my daughter a hoodie for Christmas; right color, right size, with her standing next to me to make sure we got it right.

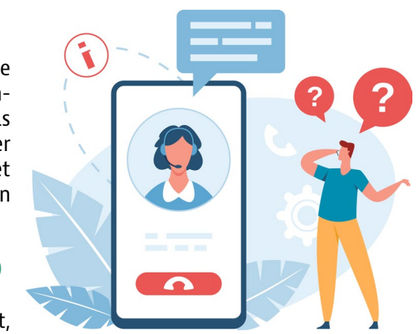
We selected everything correctly, but when we reached the payment page, the site silently changed the size to whatever it had in stock.

Unfortunately, we didn't catch it in the moment. The confirmation email that landed in my inbox showed the truth: right color, wrong size. A week later, the hoodie arrived but two sizes too big, exactly as the receipt had warned, if we'd caught it sooner.

A week later, the return arrived, and I placed a new order; right size, but now a different color, since the original was gone. But by the time the second hoodie showed up, Christmas had passed.

The company knew about the checkout glitch. It was sitting in their own reviews. But they left it unfixed, which meant their customer service team spent the holiday season fielding a problem the product team could have solved with one line of code.

That's not agent goodwill failing; that's a company asking its service team to apologize for something it chose not to fix.



Here's what should have happened. If the size we wanted wasn't available in that color, the product page should have told us that upfront, before we ever paid; not swap it silently at checkout and hope we didn't notice.

After some digging, I found reviews describing the same problem, so this wasn't a one-time glitch. It was a known flaw in the site's inventory handling.

I reached out to customer service. They were polite and did what they could: sent a return label, had me drop the package at the post office, and told me I could reorder once the return was received.

2 *Establishing and Following Effective Processes*

This is where the extra mile either becomes safe to give or turns into a liability. Here are several critical processes to consider implementing:

- Defined hold time limits.
- A *real* escalation path.
- And critically, a good recovery process for what happens when something goes wrong, such as a package being delivered to the wrong address. It turns a mistake into a moment that builds trust. It also protects the agent, who isn't left improvising alone under pressure.

Authentication belongs here too. And it's worth being specific about.

A caller stuck on hold for 15 minutes digging up a Social Security number isn't proof your protocol is thorough; ***it's proof it's badly designed.*** The fix isn't loosening it, and it isn't making the caller suffer through it either. Instead, it's building an authentication process that's fast ***and*** secure.

This process should include:

- Multiple verification paths so a caller isn't stuck if they don't have one piece of information on hand.
- Systems that flag unusual patterns, instead of relying on an agent's gut feeling under pressure.
- Clear escalation rules so an agent never has to decide, in the moment, whether to bend the rules for a caller who sounds legitimate.

When that structure exists, an agent doesn't have to choose between protecting the company and being kind to the caller. The process has already made that choice for them.

3 *Having the Right Working Environment*

This is the environment an agent works in, down to the details customers never see. The hold music. The CRM. The high-quality background noise-canceling headset (unless they are on video chats).

Whether an agent can see a caller's full history on one screen or has to dig across five different systems while the caller waits, each of these feels small on its own, but they compound.

A clunky system doesn't just slow an agent down; it shows up in their tone, their patience, and their ability to focus on the person on the line rather than on the screen in front of them. The same issues occur when hearing noise from co-workers or from a construction crew working next door to the agent's home.

The goal is an interaction that feels seamless on both ends of the call; for the caller and for the agent making it happen.

4 *Hiring and Retaining the Best People*

Hire for attitude as much as skill; the right temperament can't be taught the way a script can. Then keep investing: ongoing coaching instead of one-time onboarding, and ensuring feedback that flows both ways and says something specific rather than vague.

Also:

- Tie motivation and rewards to providing real moments of great service, not generic perks.
- Offer pay and benefits that make an agent want to show up for their shift, not just show up to avoid a write-up.

Leadership matters. The person leading a team shapes whether the agents feel supported enough to go the extra mile or are too depleted to bother.

Here's what that looked like in practice. I noticed a handful of agents who were genuinely exceptional with callers - not scripted, just naturally good at the job - and got curious about what set them apart.

> **LEADERSHIP MATTERS. THE PERSON LEADING A TEAM SHAPES WHETHER THE AGENTS FEEL SUPPORTED ENOUGH TO GO THE EXTRA MILE OR ARE TOO DEPLETED TO BOTHER.**

I ran a skills gap analysis, comparing what a top performer did differently from a lower performer on the same type of call.

Then I built training around it: a web-based course, listening to recorded training calls, newsletters, and short emails, each focused on a single skill at a time rather than everything at once. Every training class was paired with a mentor who actually had the skill we were trying to teach.

It worked, slowly. Agents who wanted to grow began adopting the same instincts as their mentors. Take a routine call regarding the status of an enrollment application:

- The standard version: verify the caller, give the status, done.
- The version the top performers landed on: verify, give the status, then — with the caller's permission — walk them through the self-service option to check status themselves, and give them a realistic timeline for what happens next.

Nobody asked for any of that. It just became the best way the agents handled the call.

That extra minute mattered. It meant more first call resolutions and fewer repeat calls, because callers actually knew how to find their own information next time. That's not a soft "nice-to-have "; it shows up in your call volume.

None of that happened by accident. It was a deliberate choice to study what good looked like, build training around it, and keep reinforcing it on the floor, again and again, as time went on.

None of this works without Leadership living it first. A team can have every tool and every training module in place, but culture is set from the top down; agents watch what their leaders tolerate, reward, and model far more than what's written in a handbook.

If Leadership cuts corners under pressure, agents learn that cutting corners is fine. But if Leadership stays calm, curious, and consistent, that becomes the standard the floor holds itself to.

Culture isn't a poster in the break room. It's what decides whether everything else in this section actually sticks.

When these four areas are built with intention, "the extra mile" stops being a wish everyone makes and nobody quite reaches; a bit like buying a lottery ticket and hoping. But even with all four in place, the job still asks something of the people doing it.

PROTECTING THE PEOPLE WALKING THE EXTRA MILE

Even with all of that in place, going above and beyond takes something out of a person, especially when the caller on the other end is upset, or worse, hostile. That cost adds up over time.

Sometimes there's no good answer, no matter how well-trained the agent is.

A customer whose refrigerator breaks down in the middle of a snowstorm, with their state under a declared state of emergency, isn't wrong to be desperate. Still, there may be no technician, no truck, and no way to make "immediately" happen, no matter how much the agent wants to help.

Other times the caller isn't just upset. They're cursing, berating, or reaching for a racial slur.

In both cases, agents need real de-escalation training first: the skill to stay calm, acknowledge the frustration, and steer the call back toward something productive.

But training has a ceiling. Once a caller crosses from angry into abusive, no amount of skill should be expected to absorb it.

That's where policy has to take over: like one on call disconnects that tell an agent exactly when they're allowed to end a call and backs them up for doing it.

Here's what a well-built policy does with that fridge call. Instead of leaving the agent to guess in the moment, an AI-assisted system is already listening, flags the situation as a weather-related emergency, and surfaces the right policy on the agent's screen before they even have to ask.

- A triage guide for what counts as urgent.
- A list of possible solutions to offer, such as an expedited repair slot, a temporary loaner unit, a food-spoilage allowance, and a prompt reminding the agent to acknowledge the caller's stress before jumping to logistics.

> **GOING THE EXTRA MILE CAN'T BE LEFT UP TO CHANCE.**

The agent still can't make a truck appear faster than the roads allow. But they're not improvising anymore, and neither is the caller. That's what it looks like when a company thinks ahead: not eliminating hard moments, but making sure the agent walks into them already equipped.

Even the best policy doesn't finish the job. An agent needs somewhere to put that call down before the next one starts.

A few slow breaths, a grounding technique, something small an agent can lean on in the seconds between hanging up and the next call coming in.

But the real fix isn't a coping trick; it's built into the schedule: a five- or eight-minute break after a hard call, treated as a normal part of the day rather than something an agent has to ask for permission to take.

Some centers go further and build a specific code into their scheduling system, so an agent can take extra time to recharge after an abusive call and still get paid for it. ***The point isn't to make agents tougher. It's to make sure the system never expects them to be.***

This is where recovery matters again, but now for your team, not just the customer. Hiccups are inevitable. The extra mile isn't really tested when everything goes smoothly; it's tested when something breaks.

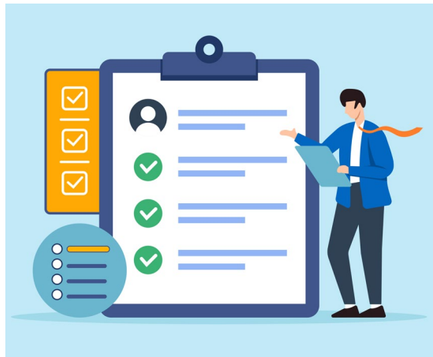
A team with clear authority and a process that doesn't assign blame emerges from that moment with the customer's trust intact, without the agent carrying it home as a personal failure. A team without that support absorbs every hiccup as stress, and that's exactly how burnout takes hold.

WHY THE RULES MATTER

The agent is the front line. They're the ones who reply to emails, pick up the phone, answer the chats, or respond to comments on social media. And they can go the extra mile with real ease when the company has given them the support to do it.

Think of it like boiling water. You can do it on the stove if that's all you have, and it'll get there eventually. Or you can use a microwave, which takes a fraction of the time: same result, different tools.

An agent without the right products, processes, working environment, and people behind them can still go the extra mile; it'll just cost them more, take longer, and wear them down faster.



THE SMALL THINGS, DONE WITH GREAT LOVE

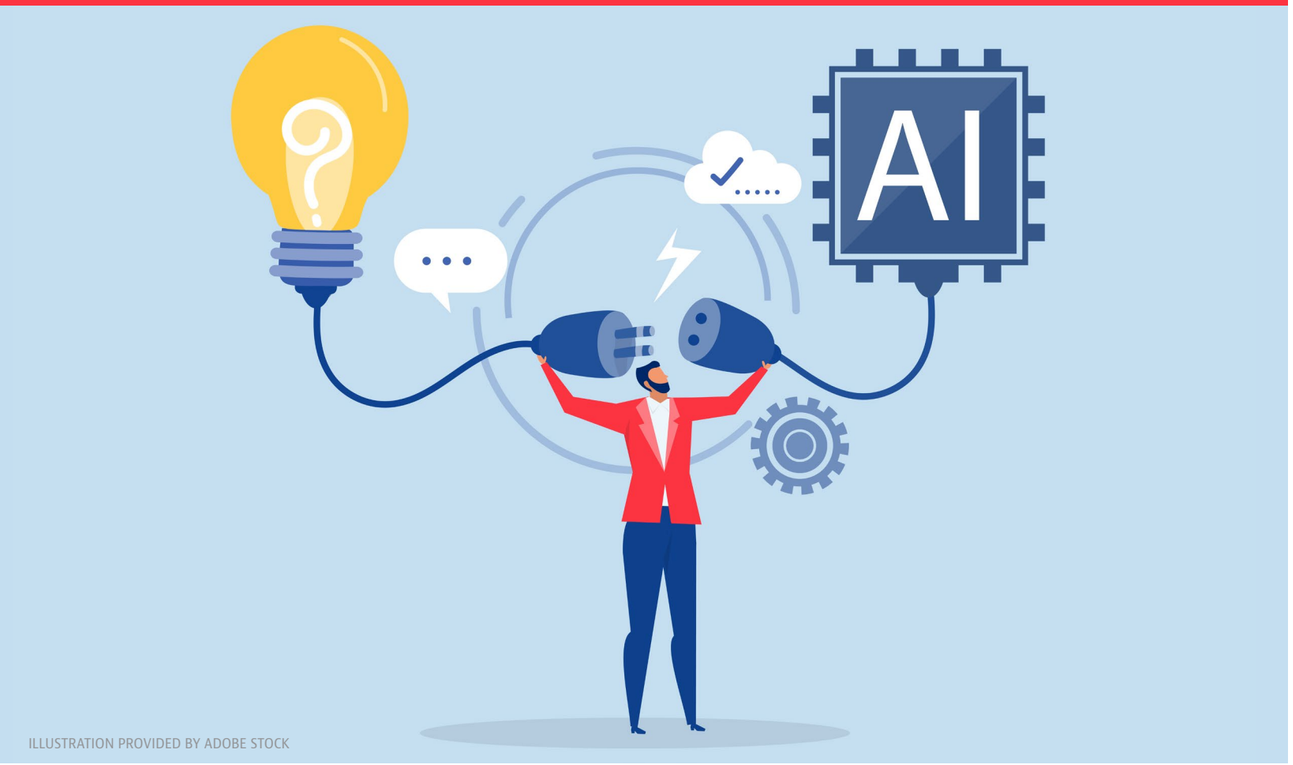
Going the extra mile can't be left up to chance. It has to be intentional; built into the product, the process, the environment, and the people, and modeled by the leaders who set the tone for everyone else.

Even when a call goes off the path, and some will, those same four areas I discussed become the GPS that gets an agent back on track: a process to fall back on, an environment that supports them, people who trained them well, and a product worth standing behind.

Small things, done with great love, and done on purpose. That's what going the extra mile should really mean.

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

BY MIKE AOKI AND ADAM BOELKE



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BEFORE AI BECOMES THE NEXT IVR

HOW CONTACT CENTER LEADERS CAN IMPLEMENT AI PROPERLY.

Contact centers have been through major technology promises before. IVR, chat, omnichannel platforms, workforce optimization (WFO) tools, knowledge bases, automation, and now AI have all arrived promising greater efficiency, lower costs, and a better customer experience (CX).

The difference was rarely the technology alone. It was how thoughtfully leaders implemented it, communicated the purpose, prepared employees, and understood the effect on customer effort and employee trust.

AI may be the most powerful tool contact centers have seen in decades. But if leaders treat it primarily as a cost-cutting shortcut instead of a performance and experience enabler, they risk repeating old mistakes faster, louder, and with greater consequences.

THE PROMISE AND PRESSURE OF AI

AI is entering contact centers when leaders are under pressure to reduce cost, improve service levels, increase speed, and do more with fewer resources.

The danger is that AI is too often positioned as a replacement strategy rather than an enablement strategy.

When frontline employees hear, "This tool is here to replace you," they understandably lose trust in its adoption. When they believe automation is being done *to* them instead of *with* them, they are far less likely to embrace and improve it or help make it successful.

AI should instead be positioned as a power tool, *not* as a replacement crew. One that helps skilled people work faster and reduce strain, but does not replace the human judgment, care, and adaptability required to do the job well.

AI can remove friction and handle routine work. But complex, emotional, and trust-sensitive moments still depend on people.

Part of the challenge is that the public narrative around AI has focused heavily on replacement. Some outside the contact center industry have predicted major customer service headcount reductions, often based on the misconception that most customer service work is routine.

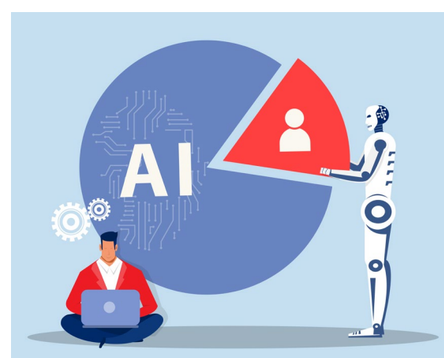
Here's the reality. Password resets, basic knowledge questions, and simple transactions may be easier to automate. But contact centers live in the exceptions. Every product launch, marketing campaign, policy change, or system update can create issues the organization did not anticipate.

For example, Mike has seen a marketing launch generate two weeks of upset contacts before the FAQ even reached agents. Agentic AI can only catch up once the answers *actually exist*.

The bigger gap is emotional, *not* procedural. Even when AI communicates convincingly, customers may trust the answers less, even when they are accurate.

When customers are upset, they may need more than information. They may seek reassurance, accountability, judgment, empathy, or simply the confidence that a human being understands the problem.

AI can become a powerful agent-enablement tool and valuable service channel. But when it is introduced primarily as a cost-cutting measure, that framing shapes how it is implemented, how employees receive it, and how customers experience it.



> ***...IF LEADERS TREAT [AI] PRIMARILY AS A COST-CUTTING SHORTCUT...THEY RISK REPEATING OLD MISTAKES FASTER, LOUDER, AND WITH GREATER CONSEQUENCES.***

WHEN HEADCOUNT SAVINGS TAKE PRIORITY

Adam saw this lesson play out some years ago in a large national utility contact center where he was brought in to help stabilize the operation after an IVR rollout missed the mark.

The center was entering its predictable summer call volume spike of roughly 40%, driven by families moving while children were out of school. Because the utility's systems, regulations, and processes were complex, new hire training took six weeks. Spring was always the ramp-up period.

That year, IVR vendors claimed their systems could deflect a large percentage of calls through self-service. The call center director saw an opportunity to modernize and reduce staffing costs. He bought the IVR, assigned strong people to the implementation project, and cancelled the spring training classes.

Then summer arrived.

When the first wave of calls hit, the IVR failed under the pressure. Customers bypassed the system, queues backed up, and hold times spiked. By the time customers reached an agent, many had already been through a frustrating self-service experience and waited far too long to handle a basic request.

The frontline absorbed the failure. Agents were overwhelmed by customers who were angry before the conversations even began.

Team leaders, supervisors, quality assurance (QA) staff, trainers, and managers jumped on the phones. But this left agents with less support when they needed it most. One-on-ones, team meetings, QA coaching, and town halls were cancelled because everyone was focused on surviving the queues.

The damage moved beyond service levels.

- Mandatory overtime increased.
- Stress rose across the center.
- Customer and employee satisfaction dropped.
- Rumors spread because normal communication channels had been abandoned.
- Employees questioned the stability of the operation, and some left for less stressful jobs.

The IVR failure triggered the crisis. The bigger mistake had happened months earlier, when staffing plans were built around projected call deflection before the technology had proven it could handle the volume.

A tool expected to reduce customer effort increased it instead, creating more stress, less support, weaker communication, and greater attrition risk.

That is the cautionary lesson for AI.

When leaders assume technology can replace the hard work of staffing, training, process clarity, knowledge management, communication, and frontline support, the costs do not disappear. They move: showing up in longer queues, repeat contacts, frustrated customers, burned-out employees, and lost trust.

WHEN AUTOMATION MOVES THE WORK

Customer effort is one of the clearest places poor implementations show up. When automation gives the wrong answer, sets the wrong expectation, or sends a customer down the wrong path, the contact center has multiplied the interaction.

Mike experienced a consumer version of this when a vacation rental chatbot could not solve a reservation issue, refused to transfer him to a human, and turned what should have been a simple resolution into two extra hours of effort.

That is the real cost behind words like "deflection" and "containment."

- When the intention is to help customers resolve issues quickly, AI can be a wonderful thing.
- When the intention is to keep customers away from the most expensive channel (human agents) that intention shows up in how the system is built and the customer pays for it in effort.

> **WHEN AUTOMATION FAILS, AGENTS INHERIT THE ANGRY CUSTOMERS, BROKEN PROCESS, INACCURATE KNOWLEDGE, AND PRESSURE TO RECOVER THE EXPERIENCE.**

WHAT BROKEN AUTOMATION DOES TO FRONTLINE EMPLOYEES

Customers are not the only ones who absorb the cost of poor implementation. Frontline employees do too. When automation fails, agents inherit the angry customers, broken process, inaccurate knowledge, and pressure to recover the experience.

That creates several hidden costs.

- Increased emotional load because the interaction often begins with frustration.
- Weakened trust in leadership when agents feel decisions were made far away from the realities of the floor.
- Increased resistance to future change because employees handed broken tools become skeptical of the next "improvement."
- Higher burnout and attrition when high-performing agents spend their days apologizing for systems they did not design, cannot fix, and are still expected to defend.

Mike saw this after ordering from a major home hardware company. The company sent an automated form letter with details that did not match his order.

When he called customer service, the agent explained that the letter was automatically generated, outdated, and wrong. She resolved the concern, but sounded resigned, as if everyone already knew the letter was wrong, knew it was driving unnecessary volume, and knew nothing was likely to change.

That kind of resignation is dangerous. It discourages agents who want to do a great job.

It also points to a major AI readiness issue: AI can only work from the knowledge and processes it is given.

If veteran agents have sticky notes on their monitors with the newest and most accurate information, that may be where the *real* knowledge base lives. Meanwhile, your agentic AI is pulling from the outdated database, not from the correct answers taped to the side of your best agent's screen.

Every broken technology rollout has a human cost. It shows up in frustration, disengagement, absenteeism, turnover, and the loss of discretionary effort.

BUILD THE FOUNDATION BEFORE YOU SCALE THE TECHNOLOGY

The better path is not to slow AI adoption out of fear. The better path is to implement AI with the same discipline leaders would use for any major operational change.

That starts with clarity. Leaders need to be clear about what AI is intended to do, what it is *not* intended to do, and how frontline employees will be involved.

Silence creates uncertainty, and uncertainty creates fear. When leaders do not communicate clearly, employees fill in the blanks with the worst possible interpretations.

Leaders also need to involve frontline employees early. Agents know where customers struggle. They know which processes are broken, which knowledge articles are outdated, which policies create repeat contacts, and which customer issues require human judgment.

Skill development matters as well. As AI handles more routine work, agents may increasingly handle more complex, emotional, and exception-based interactions.

AI, then, does not make agents less important. Instead, it makes their skills *more* important.

AI is only as useful as the knowledge, processes, and data it draws from. If the knowledge base is inconsistent, outdated, or fragmented across departments, AI will distribute the confusion faster.

This requires more than simply loading content into the AI platform. Leaders need a clear, ongoing governance process for:

- What information is approved.
- Which department/team owns it.
- How often it is reviewed.
- How frontline feedback is used to catch inaccurate, biased, or hallucinated responses before they scale across CX.

Leaders can use AI-driven QA, customer sentiment measurement, and speech analytics to identify where processes are broken and what needs to change.

Nothing exposes gaps in processes and knowledge bases faster than rolling out AI without changing anything else. The key is to build those fixes into the rollout itself, rather than treating them as clean-up work after the damage is done.

Finally, leaders need to treat culture as part of the implementation plan. Adoption depends on trust. Trust depends on communication, involvement, consistency, and follow-through.

AI works best when it is part of a broader operating system for performance, not when it is treated as a shortcut around leadership, training, process improvement, and employee engagement.

PRACTICAL QUESTIONS FOR CONTACT CENTER LEADERS

Before implementing or expanding AI, leaders should ask:

- Have we clearly communicated the purpose of AI to our employees?
- Have we involved frontline employees in identifying the best use cases?
- Have we cleaned up our knowledge base, SOPs, and process inconsistencies?
- What is our actual goal in implementing AI: cost containment, customer satisfaction, or agent engagement and retention?
- Where can AI help our human agents the most, not just our customers?
- Have we created feedback loops so agents can flag where AI is helping, hurting, or creating new friction?

The organizations that get AI right will not be the ones that simply automate the most. They will use AI to remove friction, elevate frontline performance, reduce customer effort, and strengthen the relationships between employees, customers, and the business.

> **AI, THEN, DOES NOT MAKE AGENTS LESS IMPORTANT. INSTEAD, IT MAKES THEIR SKILLS MORE IMPORTANT.**

AI may be new, but the leadership lesson is not. Technology performs best when people are prepared, involved, and supported.

The last technology rollout should have taught us that. AI gives contact centers another chance to get it right.

MIKE AOKI

ADAM BOELKE

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BY JOHN GOODMAN, CUSTOMER CARE MEASUREMENT & CONSULTING (CCMC), WITH THOMAS HOLLMANN, ARIZONA STATE UNIVERSITY CENTER FOR SERVICES LEADERSHIP, BILL PRICE, INTENDRA, AND DAVID BEINHACKER, CCMC.

ILLUSTRATION PROVIDED BY ADOBE STOCK

ENHANCING THE VOC PROCESS

FIRST, BUILDING THE FOUNDATION.

The Voice of the Customer (VOC) process is strategically critical because it reduces preventable problems and improves products and their delivery. Every dollar invested in a well-designed VOC program typically returns 10–20 times the ROI of the same dollar invested in direct customer service.

This is Part 1 of a two-part article. Part 1 focuses on the structural foundations of a high-impact VOC program. Part 2 examines execution: reporting, action planning, accountability, tracking, and practical low-cost enhancements.

BACKGROUND, OBJECTIVES, AND METHOD

In 2019, *Contact Center Pipeline* partnered with Customer Care Measurement & Consulting (CCMC) to survey its reader base on performance across key VOC activities.

These activities included unified management, data collection planning and execution, analysis, and reporting, and then taking action, communicating priorities, and measuring outcomes.

VOC success was defined as a significant year-over-year (YoY) increase in customer satisfaction and a high percentage of VOC-identified issues resolved in a timely manner.

In 2026, we, also with *Contact Center Pipeline*, prepared the 2026 VOC Impact study, which broadened the sample to include companies known to be innovators.

While the total sample was smaller than in 2019, CCMC identified eight companies with strong VOC impact, evidenced by sustained YoY satisfaction gains and a high rate of issues fixed through VOC.

The commonalities across these companies are shared below, along with specific examples from three organizations — Michelin, Nestlé Purina, and Travelzoo — which operate high-performing VOC processes and agreed to be identified by name.

THE BASICS ARE THE SAME— BUT COMPLEXITY IS GREATER

The 2026 results reinforce the findings of the 2019 study. Critically, with the advent of new technologies, they also suggest a restructuring of the factors that support the design and implementation of the technical architecture of VOC applications.

These applications now automate large portions of VOC collection, analysis, reporting, and implementation monitoring. However, they do not deliver meaningful results and insights without careful management and monitoring by both savvy quality and product management leaders; these tools are NOT fire-and-forget.

Mindless deployment risks repeating what has already happened with blanket post-interaction surveying of every customer touchpoint: wasted resources, customer alienation, and inactionable output.

> **MINDLESS DEPLOYMENT RISKS REPEATING WHAT HAS ALREADY HAPPENED WITH BLANKET POST-INTERACTION SURVEYING OF EVERY CUSTOMER TOUCHPOINT...**

Figure 1 shows the six basic factors that map to the VOC data journey from collection to reporting, impact, and evaluation.

The six factors include one governance factor — single executive ownership — and five process factors that span the journey from data collection planning to reporting and impact measurement.

Here, in this first article, we will focus on the first three: governance, unified data collection, and AI-enabled analysis, with the others covered in Part 2.

THREE DESIGN CHOICES THAT BUILD VOC CAPABILITY

As noted earlier, eight respondent companies indicated strong YoY increases in satisfaction. Their reporting forms the basis for the following updated dimensions of a best-in-class VOC process.

1 *One Executive in Charge of VOC Is Critical*

There is still no single ideal functional home for the VOC executive. However, one executive must be clearly in charge and accountable.

Because VOC inherently surfaces "bad news" and then points to the function best positioned to address the issue, accountability for performance, accompanied by explicit executive support, is essential.

Diluted leadership in this area leads to handwringing and very little impact. Conversely, a strong leader can portray customer dissatisfiers as trapped revenue and profit that can be captured rather than surrendered.

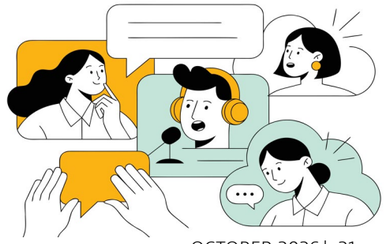
The VOC executive should prepare management for bad news and reframe it as escaping profit that can be recaptured. See "Researchers: Bad news is inevitable, so set expectations," *Quirk's Media.*

The key to success seems to be less the executive's home function than the executive's reach across other functions to gain access to broader data sources and analytical input.

Further, this executive should be responsible for reporting on how well all critical functions — Product Management, IT, Quality, and Marketing — work together to identify and resolve the most important points of pain and the strategies that cause them.

2 *A Unified Data Collection Plan Has Grown in Complexity*

This complexity is driven in several ways, including the use of AI and the capture of instances and causes of escalation. At the same time, two enduring challenges still run across the customer journey: consistent coding of issues and reliable customer identification.



SIX FACTORS IMPACTING THE VOC PROCESS

FIGURE 1

Innovations and best practices in this area include:

A. Consistent classification schemes across all functions

Different modes of naming issues impede the ability to integrate data. Several companies use AI to collect data from multiple sources and rationalize it into common pools with consistent descriptions of customer issues, whether from consumers (via complaints or social posts), dealers, or warranty data.

B. AI for coding and sentiment

AI can be used for coding and sentiment analysis of voice, chat, email, and social posts. Michelin scans social media sources for comments and issues, as well as review sites and social media influencers, regardless of location. Meanwhile, Nestlé/ Purina monitors and responds to all its own social properties.

"We found that stories and descriptions posted by influencers in one geography can have significant impact on consumer expectations in completely different geos where the marketplace is very different," says Joe Mazure, Director of Consumer Care for North America, Michelin.

"Each geography cannot assume it is operating separately, at least in the social media world."

C. AI to identify sources of new customers

AI is increasingly able to ascertain the source of new customers, including the ability to identify and track customers acquired via positive word-of-mouth/ mouse (WOM/M).

With the advent of social media, and the ratings/reviews on this channel as primary methods of shopping and customer education, *the ability to assess these impacts at the individual customer level as well as at the market segment level, is critical.*

AI can review disparate data sources about each customer to tease out correlations for small segments that would be impossible to find using traditional research methods.

In many markets, including all three of the leaders mentioned here, WOM/M impacts can actually be *larger* than the direct impact of problems on customer loyalty.

D. Customer and employee advisory boards

Establishing customer and employee advisory boards results in both groups proactively noticing opportunities and contributing more actively because they know their comments will have impact.

Michelin and Travelzoo have quarterly employee input sessions, while Nestlé Purina maintains an open channel for contact center employees, beyond simply telling their supervisors.

E. Feedback on the impact of feedback

Showing what was done with feedback dramatically increases future feedback and builds trust that contact center employees can convey to consumers.

CCMC's 2025 National Rage Study found that the desire to be heard is almost as important as having the problem resolved. If CSRs assure the consumer that their input will be heard, this significantly enhances satisfaction with the contact.

F. Tracking and proactively offering escalation

Leading companies track complaint escalations and sometimes use AI to identify situations in which proactive escalation should be offered.

Lisa Oswald, Global Head of Member Services, Travelzoo, reports, "Our frontline reps code reasons for escalations to identify what was missing that led to the appeal, such as a confusing deal page, lack of information, loss of value, or a broken process.

"Further, we view 100% of negative surveys as escalations and review all, as they provide information on why the root-cause issue was not resolved when first encountered."

3 *Analysis and Data Integration Have Become Supercharged*

Analysis and data integration have become supercharged by AI and by the addition of part-time analysts from other functional departments.

The expected actionability of the output has also increased. VOC users now say, "Don't just tell me there is a problem. Identify the cost, the root cause, and suggest mitigating actions."

A. Cross-functional participation in analysis

All of the leading companies include representatives from Product Management and Marketing in the analysis process, and most also include Quality and Performance Improvement personnel.

At Travelzoo, there is a liaison with IT who is resident in the Member Services Department and understands the complete IT product-development environment. This person helps ensure that customer-identified problems are fixed, the analysis is valid, and the recommendations are realistic.

B. AI-enabled integration of diverse data

AI is being used to integrate available data into a single, unified picture of market reality. Integrated data include:

> **SHOWING WHAT WAS DONE WITH FEEDBACK DRAMATICALLY INCREASES FUTURE FEEDBACK AND BUILDS TRUST...**

- Communications and text analysis
- Surveys
- Postings by consumers, communities, review sites, and influencers
- Operational data, such as website interactions and production and supply chain changes that affect product and service availability and characteristics.
- Website search records (both successful and unsuccessful)
- Transaction failures

These last three categories of operational parameters are called the "Voice of the Data" by Bill Price, CEO of Intendra and author of *The Best Service Is No Service.*

C. Use of multipliers

Companies use multipliers—the ratio of complaints to problems found in the marketplace, usually 1:8 to 1:15 - to extrapolate complaint data to the market level.

These ratios surprisingly apply to business-to-business (B2B) environments as well; business clients behave like consumers and often don't complain.

This analysis allows complaint data to be combined with survey, warranty, and internal quality-inspection data.

Further, the loyalty and WOM/M damage associated with complaints and unarticulated problems can be layered onto those other sources to estimate the overall revenue and WOM/M losses of each issue or point of pain.

Nestlé Purina has introduced this analysis to quality and product managers to strengthen the impact of VOC analysis.

> **REVENUE ANALYSIS INCREASINGLY INCLUDES THE NEGATIVE EFFECT OF LOST CUSTOMERS AND THE POSITIVE EFFECT OF NEW CUSTOMERS ACQUIRED...**

Terri DeMent, Director of Consumer Service, Nestlé Purina, reports, "Quality, Product Management, and Finance have all been receptive to using the complaint multiplier concept (e.g., for each complaint received, there are eight other cases in the marketplace).

"This helps to make stronger business cases because it demonstrates that more consumers are actually encountering the issue than only those who have complained to us."

D. AI on free text to find hidden associations

AI is being applied to free text to identify previously unknown associations and market segments. Examples include:

- Identifying which customer onboarding method is most successful at setting expectations for technology products, thereby preventing subsequent problems and churn.
- Linking higher turnover in rentals among single female apartment dwellers to a prior history of complaints about poor parking-lot lighting.

Both connections would have been difficult to identify without AI analysis across a wide range of data.

E. Inclusion of WOM/M impacts in revenue analysis

Revenue analysis increasingly includes the negative effect of lost customers and the positive effect of new customers acquired via delight stories.

In some environments, customers acquired through positive WOM/M are assigned a higher value because they tend to be less price-sensitive.

Robust positive WOM/M also drives customer acquisition at much lower cost than traditional tools such as advertising and promotions. The most successful companies acquire *as many as 70% of their new customers* via WOM/M at extremely low cost. Further, as noted above, such customers are less price sensitive.

F. Translating impact into revenue

Output now includes the number of customers affected by each issue; in most cases, that number is converted into revenue implications using an extended customer value.

Many companies are moving away from traditional customer lifetime value (CLV) because Finance is often skeptical of very long-term estimates. Many now use a maximum of three years of revenue.

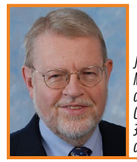
G. Revenue-based prioritization

In most leading companies, including Travelzoo, Michelin, and Nestlé Purina, the CX analysis group identifies priority issues based on business impacts and/or the number of customers affected.

Sometimes employee input and impacts are also included, as 30% of customer points of pain (POP) are *also* employee POP.

WHAT COMES NEXT IN PART 2

Part 1 has focused on the structural choices that make VOC credible and analytically useful: executive ownership, unified data collection, and stronger analysis. Part 2 turns to execution: how leading companies report VOC insight, assign accountability, track results, and avoid the blind spots that weaken ROI.



John Goodman is Vice Chairman of Customer Care Measurement and Consulting (CCMC). He has assisted 45 of the Fortune 100 companies. Harper Collins published the second edition of his book, CX 3.0 featuring updates on AI and other technologies as well as research in April 2024.

BY MIKI FURMAN, CALL FORCE GLOBAL

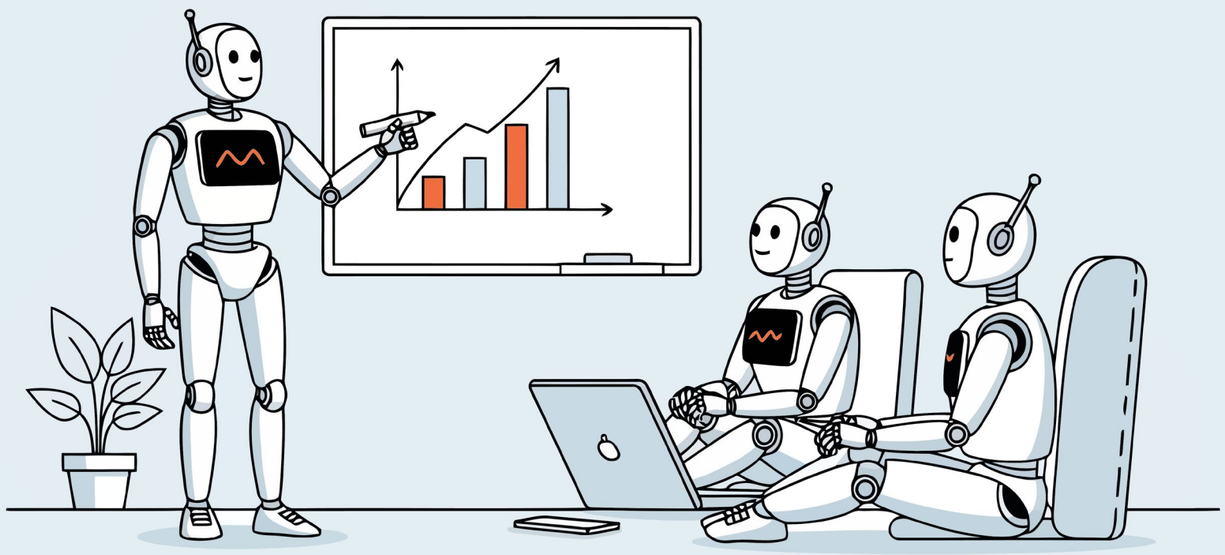


ILLUSTRATION PROVIDED BY ADOBE STOCK

WHEN THE AUDIENCE IS NOT HUMAN

WHY TRADITIONAL DEFLECTION METRICS CAN'T BE TRUSTED.

Consider these increasingly common occurrences throughout contact centers:

- An AI assistant reads your knowledge base on a customer's behalf, answers them, and never opens a ticket. Your deflection rate improves.
- An agent-shaped bot fills in your web form. Your speed-to-lead starts timing how fast you called a robot back.

Neither event involved a person. Both were counted. And somewhere a budget or a headcount plan rides on the count.

HOW AI DISTORTS METRICS

That is the whole problem, and it reaches further into your reporting than most people expect.

- Your cost per contact improves when contact volume rises. If a share of that volume is AI bot software rather than customers, the number gets better while the cost of serving an actual person gets worse. You will carry that improving number into a budget meeting and defend it.
- Your chatbot containment counts a session that ended without escalation. An AI summarizer walking your chat flow ends exactly the way a satisfied customer does.
- Your first contact resolution (FCR) assumes there was a first contact. The moment that contact was a script, the metric is describing something that did not happen.

None of these counters are broken; each of them is doing precisely what it was built to do. But what happened is that the population - AI bots versus people - underneath them changed.

I can prove that in one channel, and reason about the rest. Here is the worked example, and what it means for the numbers you own.

> **THE MOMENT THAT CONTACT WAS A SCRIPT, THE METRIC IS DESCRIBING SOMETHING THAT DID NOT HAPPEN.**

MY EXPERIENCE WITH AI SKEWING OUTCOMES

I am co-founder and CTO of a nearshore call center company and I build our AI quality systems. This started with an afternoon I had not planned to spend on it. I was checking that a page of our own research was being found, so I opened our web search report and sorted it by volume.

It did not look like people.

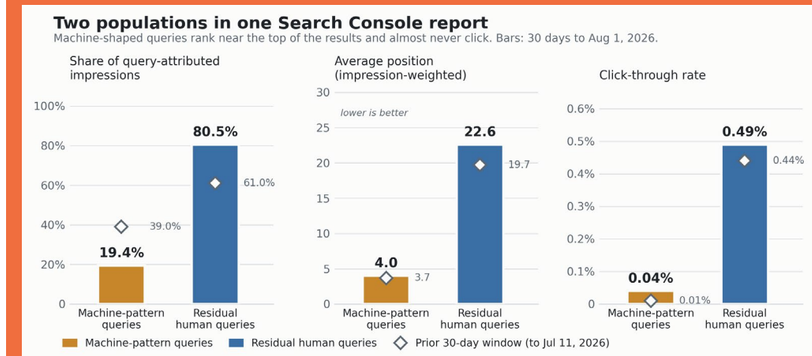
The largest single query on the property was a seven-word sentence: "belize healthcare outsourcing hipaa phipa alignment 2026." Below it sat near-identical sentences with the same clinical phrasing and year stamp, differing by a word or two.

The top four queries had between roughly 2,200 and 5,500 impressions each. The click column read zero all the way down.

Here's what really tipped me off that something was wrong. *Nobody types the same seven-word sentence 5,000 times in a month.*

Machine and bot traffic alone would not have been worth an afternoon; every website collects some. What bothered me was the shape. Real human demand has one: a head of short queries, a long thin tail, and clicks that roughly track position. This had none of it.

FIGURE 1



Source: Call Force Global, AI Search Impressions Study. One B2B Google Search Console property. Released under CC BY 4.0.

I used web search for the proof because of what it hands back to you. Most channels give you an event and nothing else: a session opened but a ticket did not appear. Web search gives you the exact string the visitor typed, which means you can sort the two populations apart instead of guessing at them.

So, I did what an engineer does with a dataset that offends him. I exported it and wrote code to take it apart.

The Split, Run Twice

For the 30 days to July 11, 2026, strings that no person types accounted for 39% of the impressions that carried a visible query string, which is the only portion anyone can classify.

Then I reran the same code against the 30 days to August 1. It came back at 19.45%.

Same property, nothing changed on my side, and the share halved.

FIGURE 1 shows the two windows side by side, and the two populations sit apart on every measure that matters. Machine and bot queries averaged position 4.0 in the current window against 22.6 for the humans, and clicked at 0.04% against 0.49%.

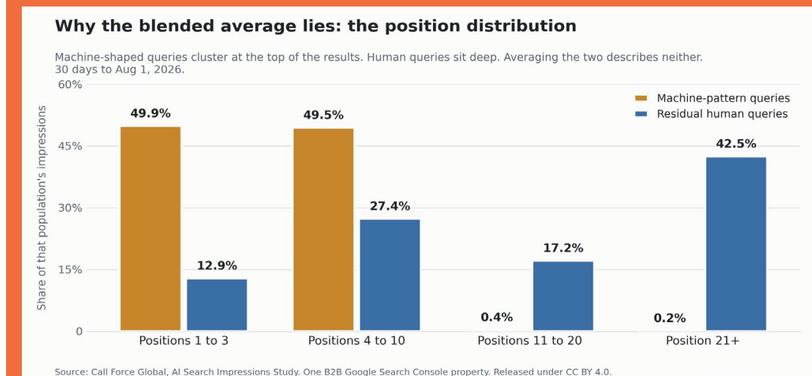
Blend them, as every standard report does, and the property reports a 0.41% click-through rate. In the earlier window the blended figure was 0.27% against 0.44% for humans alone.

Every input is real. *But the output is fiction.*

That volatility is why I will not hand you a correction factor, meaning a fixed multiplier you apply to a contaminated number to estimate the clean one.

Divide human-only by blended and mine was roughly 1.6 in July and roughly 1.2 six weeks later. Anyone selling you a fixed adjustment for bot traffic is selling a number with an expiry date.

FIGURE 2



Source: Call Force Global, AI Search Impressions Study. One B2B Google Search Console property. Released under CC BY 4.0.

> **CONTAMINATION DOES NOT SPREAD EVENLY ACROSS A REPORT. IT POOLS WHERE THE NUMBERS LOOK BEST, WHICH MEANS CLICK-THROUGH RATE FALLS HARDEST ON THE PAGES YOU WOULD POINT TO AS PROOF THINGS ARE WORKING.**

Where The Junk Sits

I expected the machine and bot traffic to sit deep in the results where nobody looks. It does the opposite and **FIGURE 2** is the picture of it.

Half of all machine and bot impressions, 49.9%, landed in the top three positions. Only 12.9% of human impressions did. The humans pile up at the bottom instead: 42.5% of them at position 21 or worse.

Contamination does not spread evenly across a report. It pools where the numbers look best, which means click-through rate falls hardest on the pages you would point to as proof things are working.

My first instinct was to rewrite the titles on those pages. They were never broken. Nothing was reading them. So they weren't responsible for the junk. The impressions came from software that almost never clicks, no matter what the titles said.

The Same Failure, One Funnel Over

I recognized that pattern because I live with its twin, much closer to the floor.

We score every call with an AI model and route the flagged ones to a human reviewer. A quality score rolled up across a book of calls, meaning one average standing in for hundreds of individual scores, is a blend.

If the automated layer behaves differently on one campaign than another, the average stays green while the campaign moves, and the natural response is to coach agents whose calls were never the problem.

Same failure, different channel: a number built by averaging across a population that turned out to be two.

WHERE REASONING IS NEEDED

This is the point where measurement stops and reasoning begins, and I want to be clear about which side of it I am on.

In web search, I can prove the split because I have the string. In your contact center, you usually cannot because the channel hands you the event and keeps the fingerprint.

Email opens are the one case I have observed directly. An open is recorded when a tracking pixel loads, and plenty of what loads pixels is not a recipient. Corporate security gateways open links to sandbox them and add a second layer on top.

The rest is inference, labeled as such. Deflection, containment, self-service success, and speed-to-lead all count a physical event that software can now manufacture. I have not measured those on a contact center stack. What I have measured is the mechanism they share.

WHAT METRICS SURVIVE

Now the reassuring part, which turns out to be most of your reporting pack.

Anything that ends in a human confirmation step still means what it says, because a person had to be present - an agent or a customer - for the metrics to move.

- Average handle time (AHT) holds up because a human handled the calls.
- Service levels and average speed of answer on answered calls continue to be valid because somebody stayed on the line long enough to be answered.
- CSAT, NPS, and customer effort score survive because customers chose to respond.
- Quality scores on human-reviewed calls survive for the same reason, which is exactly why we route flagged calls to a person instead of letting the model close them out.

The exposed ones are the metrics that count an event no human needs to be present for:

- Deflection rate
- Chatbot containment
- Self-service success
- Speed-to-lead
- Cost per contact because the denominator is contacts.
- FCR, when the first contact was a script.

Occupancy sits awkwardly between the two. Your agents were genuinely busy, and the number is honest about that. But busy is not the same as productive if some of the work arrived from sessions no customer needed.

The voice floor is largely trustworthy. Digital and self-service reporting is where to look first. If a metric can move without a person doing anything, treat it as an estimate rather than a count.

FIVE QUESTIONS FOR YOUR ANALYTICS TEAM

None of this requires you to touch a data export. Where a channel produces something you can read, a query string or a chat transcript, ask for 50 examples and read them yourself. You will know within a minute.

Then ask your analytics team these five questions:

1. ***What physical event increments this number? An open is a pixel load. A deflection is a ticket that never appeared.***

2. ***Can software generate that event? If yes, the count blends two populations.***
3. ***Can we split the population before we average, rather than correcting afterward?***
4. ***What does the human-only figure look like next to the blended one? The gap is itself a diagnostic, and it moves.***
5. ***Which of our metrics end in a human confirmation step? Those you can keep trusting.***

THE HONEST CAVEAT

This is one property, over 30 days, twice. A business services website with small click volume in absolute terms. I will not dress it up as a market study.

The narrower claim I will defend: on this property, in both windows, the two populations were distinguishable from the query string alone; they behaved in opposite directions on rank and on clicks, and averaging them produced a figure that described neither one.

Whether the same is true of your channels is an empirical question, and it has a cheap answer. Given what we found, I would encourage you to look.

The dataset, the classification patterns, and the reproduction script are published under CC BY 4.0 through our site. Point the script at your own data and get your own number instead of borrowing mine.

> **ANYTHING THAT ENDS IN A HUMAN CONFIRMATION STEP STILL MEANS WHAT IT SAYS, BECAUSE A PERSON HAD TO BE PRESENT - AN AGENT OR A CUSTOMER - FOR THE METRICS TO MOVE.**

Miki Furman is co-founder and CTO of Call Force Global, a nearshore call center company, where he builds its AI quality scoring systems. He publishes open datasets on measurement and AI, including the 2026 AI Search Impressions Study, released under CC BY 4.0.

BY MICHAEL RAMSEY, SERVICENOW

ILLUSTRATION PROVIDED BY ADOBE STOCK

IS LEGACY CRM HOLDING YOU BACK?

HERE'S WHAT TO DO ABOUT IT.

When AI-powered customer service falls short, most organizations assume it's solely a tech problem. In my experience, it almost never is.

The *real* issue is how contact centers were built in the first place, from the inside out, optimizing around one metric: minimizing time with human agents.

The better approach is from the outside in, starting with the outcome the customer actually needs, then building the workflows to deliver it. Done right, live agent efficiency follows naturally.

LEGACY CRM AND AI

The problem is that legacy CRM was never designed for that better approach. It was built to log interactions and open tickets, not to fulfill requests or drive resolutions.

Duct-taping AI on top doesn't change that. At best, it gets customers to the same dead end faster.

Take a customer disputing a credit card charge:

- The chatbot understands exactly what they're asking, but it restates the policy and offers no path forward.
- The customer ends up in a loop, not because the AI said no, but because they were never connected to anything that could say yes. They still have to call a live agent.

The bot didn't just fail to add value. It actively *wasted* the customer's time.

Legacy CRM promised transformation. What most organizations actually got was a digital filing cabinet: a system of record that was built to log interactions, not to drive actions.

> **THE PROBLEM IS THAT LEGACY CRM WAS NEVER DESIGNED FOR THAT BETTER APPROACH.**

According to ServiceNow research that surveyed more than 34,000 executives, service professionals, and customers globally, service reps spend *just 45%* of their time on actual customer issues.

So, what happened to most of the reps' time? It was lost to manual work and to the overhead of disconnected systems that were never designed to work together; 80% of reps must toggle between three to five systems just to resolve a single issue.

Unfortunately, most companies have been deploying AI on top of legacy contact center and customer service platforms without fixing what was already broken.

But those systems had two fundamental problems. They either deflected customers without resolving their issues or when a customer did reach a live agent, that agent wasn't empowered to resolve it because the tools, people, and systems needed to fulfill the request weren't connected.

AUTOMATION SURFACES THE WEAK LINKS

Legacy CRM was built to log what happened, not orchestrate what happens next. When issues span departments, that gap becomes visible in painful ways.

Let's say a customer calls about a service outage or a billing dispute, and resolving it requires work from teams across Fulfillment, Legal, Billing, and Operations. Legacy CRM can track the request. What it *cannot* do is route work to the right teams, trigger approvals, or ensure every task gets completed.

In such cases, human employees become the middleware, manually copying data and chasing approvals across systems. Cases fall into black holes, and no one has full visibility into status or accountability.

> **DUCT-TAPING AI ON TOP DOESN'T CHANGE THAT. AT BEST, IT GETS CUSTOMERS TO THE SAME DEAD END FASTER.**

The data asymmetry behind this is well-documented but rarely addressed. 43% of reps cite inconsistent customer data as a top daily challenge. Yet only 28% of executives recognize it as a significant challenge.

This last datapoint is troubling. When Leadership does not see the foundation problem; instead they reach for solutions that do not address it: new dashboards, more tooling, another bolt-on.

Deploying AI on top of fragmented data, siloed applications, and broken workflows does not accelerate value. Instead, it accelerates dysfunction.

Only 34% of executives report significant progress on building a genuinely connected enterprise approach, and that number explains why so many AI investments in the contact center are underperforming.

Real resolution requires AI connected to data and workflows. The system needs to know who the customer is, what they are entitled to, and what just happened.

Let's look at a disputed charge. Real-time data confirms the transaction, and the workflow resolves it immediately, or processes a refund, issues a replacement card, or schedules a callback, pulling in a human only when truly necessary.

Unified data, integrated applications, governed knowledge, and clean process design are now table stakes. For automation to deliver what it promises, the CRM must connect, sell, fulfill, and service on a single platform. Organizations that treat those as optional upgrades will keep hitting the same ceiling.

HUMAN AGENTS BECOME COMPLEX RELATIONSHIP STEWARDS

As I noted earlier, most agents spend their days doing work that should not require a human: toggling between apps, doing data entry, and acting as middleware between departments.

Perhaps not surprisingly, only 39% of service reps say they have the tools and training needed to deliver superior customer experience (CX). The tools are failing them.

What reps actually need are AI tools that surface context and next-best actions in the moment, backed by ongoing training that builds the judgment to use them well and the confidence to know when to step in.

But as automation absorbs routine work, the interactions that remain for humans are higher-stakes and more meaningful. They require emotional intelligence, judgment, and the kind of relationship-building that AI cannot replicate.

From our research, 87% of customers say phone calls are their preferred communication channel. With that, 46% say their biggest concern with AI chatbots is their inability to fully understand their questions or concerns.

AI specialists surface context and recommended next actions so the agent can focus on the relationship, not the mechanics.

That is the shift that makes service a genuine differentiator. And when a situation calls for a human, the right platform makes that handoff with full context, so the customer never has to start over.

PREDICTIVE SERVICE EVOLVES INTO AUTONOMOUS RESOLUTION

The next phase of AI-powered CRM moves beyond anticipating issues to resolving them independently: before customers ever reach the contact center.

The expectation from customers is there; 53% of customers expect AI to deliver improved speed and efficiency. The question is whether the infrastructure behind the contact center can support that. But too often, it can't.

Data siloed across disconnected systems means AI is working with an incomplete picture. Workflows that still require humans to manually pass information create bottlenecks automation can't fix.

The result? AI that moves faster toward the wrong answer.

Predictive AI, connected systems, and automated workflows are converging to identify problems, diagnose root causes, and trigger corrective actions autonomously.

A telecom provider, for example, can detect network degradation in real time, identify the affected customer segment, and initiate remediation workflows before call volume ever spikes.

With such autonomous resolution, customers may never need to reach out at all. Organizations with the right data foundation and workflow infrastructure are already running with this *today*.

The contact center's orientation shifts as a result. Instead of firefighting customer issues, teams are supervising and refining automated resolution loops. Instead of triaging incoming volume, agents are handling those cases that genuinely require human presence.

AUTOMATION MATURITY EMERGES AS A STRATEGIC ADVANTAGE

The organizations that are winning customers' loyalty (and sales) are not the ones with the biggest AI budgets. They are the ones that start with the CX they want to enable.

Such companies anticipate these key questions from customers:

- What products and services do you sell?
- What do we get based on the products and services we bought?
- What requests can we make?

Successful companies design their solutions around those answers, then build the workflows to capture and fulfill every request. That outside-in clarity is what makes everything else work.

Success requires four things working together:

1. Targeted use cases with clearly defined outcomes.
2. Trusted unified data that AI can actually act on.
3. Disciplined governance that keeps automation improving rather than drifting.
4. Closed-loop workflows that continuously learn from every interaction.

None of those are technology purchases. They are organizational capabilities that have to be built deliberately.

Leaders also need to change what they measure. Activity metrics, calls handled, cases logged, and average handle time (AHT) were designed for a model where human throughput was the primary lever. But they *do not* capture what matters in an AI-enabled contact center.

Instead, the metrics that reflect *real* progress are resolution time, first contact resolution (FCR) rates, proactive issue identification, and customer satisfaction, e.g., CSAT. Organizations that continue measuring activity while deploying AI will keep optimizing for the wrong things.

The companies pulling ahead have stopped measuring how many contacts they deflect and started measuring whether customers actually got what they needed.

Those that build this maturity unlock faster resolution, higher satisfaction, and real cost efficiencies that compound over time. Those that do not will find themselves struggling to scale automation safely, with AI that surfaces problems faster than the organization can address them.

> **THE COMPANIES PULLING AHEAD HAVE... STARTED MEASURING WHETHER CUSTOMERS ACTUALLY GOT WHAT THEY NEEDED.**

Michael Ramsey is the Group Vice President of Product Management, CRM and Industry workflows at ServiceNow, which enable organizations to create seamless customer experiences and drive fierce customer loyalty. In this role, he is responsible for strategy and execution throughout the product lifecycle, including managing strategic partnerships, investments, and M&As.

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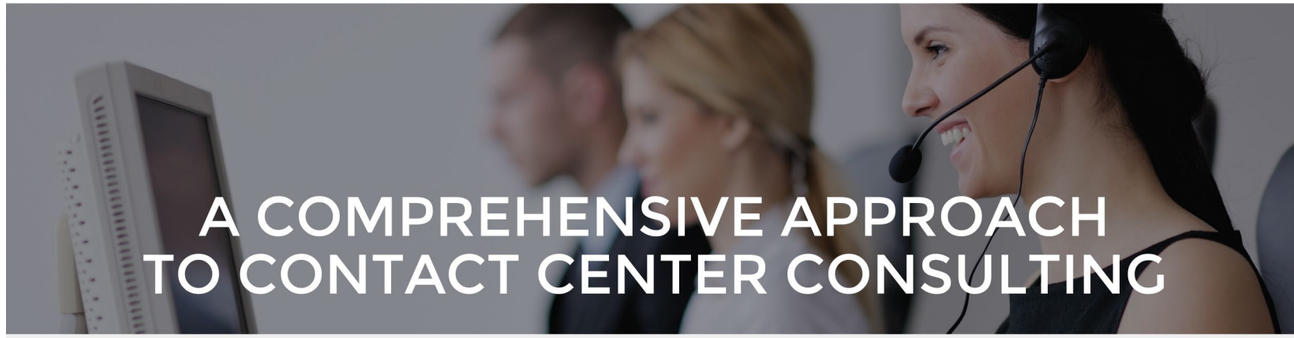

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Technology
Support Models
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WHETHER YOU NEED TO **PLAN FOR, DEFINE, ASSESS, EVALUATE** OR **IMPLEMENT CHANGE,** WE CAN HELP.

BY LEE BARTH, MARCHEX

ILLUSTRATION PROVIDED BY ADOBE STOCK

THE PHONE IS *NOT* DEAD

HOW TO TURN CONVERSATIONS INTO INSIGHTS.

When a customer picks up the phone, it is rarely a casual act. They may be:

- Trying to resolve a billing question before a payment deadline.
- Evaluating a purchase.
- Or they may simply need clarity from a human voice after using a confusing website or automated system.

These calls are often moments of urgency, trust, or annoyance. They are also some of the most consequential interactions a customer will have with a brand.

Yet for many organizations, the phone remains one of the *least* understood channels in the customer journey. While they have invested heavily in digital analytics, marketing attribution, and self-service technologies, the insights buried in customer conversations are often underutilized.

For contact center leaders, this represents both a problem *and* an opportunity. Calls contain rich signals about customer intent, operational performance, and gaps in customer experience (CX).

Those organizations that learn to analyze and act on these signals can transform the contact center from a cost center into a strategic driver of customer acquisition, loyalty, and revenue.

A CHANGING CUSTOMER LANDSCAPE

Serving customers requires balancing service, quality, and operational efficiency. That balance requires economic trends to reshape consumer behavior:

- Higher-income households increasingly account for a disproportionate share of discretionary spending. These customers often expect personalized, responsive service that reflects the value of their relationship with a brand.

> **WHEN CONTACT CENTERS LACK VISIBILITY INTO CONVERSATIONS, SMALL INEFFICIENCIES MAY QUIETLY ACCUMULATE...**

- Cost-conscious customers are essential to growth for many organizations, and they expect fast, respectful service when problems arise.

This divide creates a difficult challenge for contact centers:

- High-value customers may expect knowledgeable agents who understand their histories and can provide tailored guidance.
- Lower-margin interactions may need to be handled efficiently to keep service costs sustainable.

Over-automate service for cost-conscious customers, and frustration grows. Under-automate routine interactions, and operating expenses escalate. *The key is not choosing between automation and human interaction but understanding when and how to deploy each.*

THE VISIBILITY GAP IN VOICE INTERACTIONS

One reason this parity is difficult to achieve is that many organizations lack visibility into what actually happens during customer calls.

Traditional contact center metrics such as call volume, average handle time (AHT), and abandonment rates provide useful operational data. However, they reveal little about what customers are asking, how agents respond, or why certain interactions lead to successful outcomes while others do not.

This gap regularly allows performance issues to persist unnoticed:

- A marketing campaign may generate large volumes of inbound calls, yet many of those calls may fail to convert into appointments or sales opportunities.
- Customers may repeatedly call with the same questions because online information is unclear, yet agents may have difficulties with common objections or policy questions that could be addressed through improved training or scripts.

Without deeper insight into the content and the context of conversations, these problems can take months to surface in traditional reporting. By the time leaders recognize them, the organization may have already lost revenue, damaged customer confidence, or misallocated marketing spend.

WHERE REVENUE LEAKS HAPPEN

When contact centers lack visibility into conversations, small inefficiencies may quietly accumulate into significant business impacts.

Think of a scenario where a marketing campaign drives hundreds or thousands of inbound calls. Standard attribution tools may show the campaign successfully generating leads. But they often cannot reveal whether those calls resulted in qualified opportunities.

In one example, one of our clients that was analyzing call conversations discovered that more than 1,000 inbound calls generated by several affiliate marketing sources yielded only a small number of viable leads.

But once leaders understood what was happening in those conversations, they were able to redirect marketing investment toward higher-performing channels.

Operational issues can surface through conversation analysis. Customers frequently express annoyance during calls about appointment availability and scheduling delays. While traditional reports show normal call volumes, analysis of conversation content reveals growing service issues that risk customer satisfaction.

By identifying the problem early, leaders are able to adjust scheduling practices and address customer concerns before they intensify further. *These kinds of insights rarely emerge from conventional reporting alone.*

USING CONVERSATION INTELLIGENCE TO UNDERSTAND CUSTOMER NEEDS

Advances in speech analytics and conversation intelligence are helping organizations close this visibility gap.

Analytics tools can analyze large volumes of calls to discover patterns in customer intent, sentiment, and outcomes. Instead of manually reviewing individual calls, leaders can detect recurring themes across thousands of conversations.

These insights can reveal when customers express purchase intent but fail to convert because questions remain unanswered, showing when callers abandon interactions because of long hold times or confusing routing systems. They also highlight recurring questions that agents are not entirely prepared to address.

By surfacing these patterns, conversation analytics allows contact center leaders to focus their improvement efforts where they matter most. *The goal is to translate conversation insights into operational changes that improve outcomes for both customers and the business.*

CONNECTING MARKETING, OPERATIONS, AND CX

One of the most powerful aspects of conversation intelligence is its ability to connect teams that have traditionally operated in silos.

In many organizations, Marketing, Operations, and CX teams are measured against different KPIs, often with limited visibility into how their decisions affect one another:

- Marketing may focus on lead volume and campaign performance.
- Operations prioritizes staffing efficiency and customer handling times.
- CX teams, meanwhile, are measured on satisfaction and service outcomes.

The challenge is that all of these functions influence the same customer journey, yet they often work from separate data sets and disconnected goals. This can create friction, defensiveness around performance metrics, and difficulty identifying where customer engagement is succeeding or breaking down.

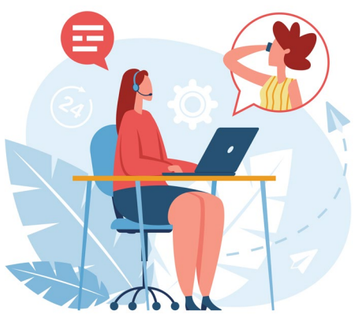
Conversation intelligence helps bridge those gaps by creating a shared source of truth rooted in actual customer interactions:

- Marketing teams gain visibility into which campaigns generate high-quality inquiries versus low-intent calls.
- Operations leaders can identify staffing gaps, workflow bottlenecks, or service issues that affect customer outcomes.
- CX training teams can use real conversation examples to coach agents on handling objections, clarifying complex topics, or improving conversion performance.

This shared visibility creates a continuous feedback loop across the organization:

- Marketing messaging can be refined based on the questions customers ask most frequently.
- Operations leaders can better align staffing with call demand patterns and service expectations.
- CX agent training can focus on real-world scenarios tied directly to customer satisfaction and conversion outcomes.

The result is a more coordinated approach to customer engagement where teams are aligned around shared customer outcomes rather than isolated departmental metrics.



SUPPORTING AGENTS WITH BETTER INSIGHT

Conversation insights also play an important role in supporting frontline agents. Agents are often the first to recognize emerging customer concerns, but without structured data, their observations can be difficult to scale across the organization.

> **CONVERSATION INTELLIGENCE HELPS BRIDGE THOSE GAPS BY CREATING A SHARED SOURCE OF TRUTH ROOTED IN ACTUAL CUSTOMER INTERACTIONS...**

Analyzing conversations helps leaders identify where agents excel and where additional guidance may be needed. Teams can review successful interactions to highlight best practices. They can also examine calls that result in customer displeasure or missed opportunities.

In some organizations, providing these insights regularly to agents has improved both productivity and involvement. When agents understand how their interactions affect customer outcomes, they are better equipped to adjust their approach and build stronger relationships with callers.

Rather than focusing solely on efficiency metrics, such as AHT, conversation insights offer a broader view of service quality and effectiveness.

DESIGNING SERVICE FOR DIFFERENT CUSTOMER SEGMENTS

Conversation data can also help contact centers design service models that meet the needs of different customer segments.

Routine interactions such as appointment scheduling, account updates, or status inquiries are often well-suited for automation or self-service tools. When implemented effectively, these options allow customers to resolve issues quickly without waiting for an agent.

More complicated interactions, chiefly those involving major purchases or sensitive concerns, may require skilled agents who are able to offer guidance and reassurance. Understanding the intent behind customer calls allows organizations to route interactions more intelligently and assign resources where they create the most value.

This balance between efficiency and empathy is essential for serving both high-value customers and those in lower-margin segments.

PRACTICAL STEPS FOR CONTACT CENTER LEADERS

Contact center leaders seeking to unlock the value of conversation insights can begin with several practical steps:

- ***First,*** evaluate call outcomes and operational metrics. Knowing which interactions lead to successful resolutions, sales, or follow-up actions gives a clearer view of performance.
- ***Second,*** analyze recurring customer questions and concerns. These patterns typically highlight opportunities to improve agent training, update scripts, or elucidate information across digital channels.
- ***Third,*** review call abandonment and AHT trends alongside conversation content to determine whether bottlenecks are affecting customer satisfaction.

> **FINALLY, TREAT VOICE INTERACTIONS AS A STRATEGIC SOURCE OF INSIGHT...**

- ***Fourth,*** share insights across teams. Marketing, Operations, and CX leaders all benefit from understanding what customers are saying directly.

Finally, treat voice interactions as a strategic source of insight rather than simply a service channel.

THE STRATEGIC VALUE OF CUSTOMER CONVERSATIONS

As organizations continue to invest in digital channels and automation, the role of voice interactions is still vital.

Customers still turn to the phone when they need clarity, reassurance, or quick problem resolution. These conversations capture authentic customer sentiment and intent in ways few other channels can.

For contact center leaders, the ability to analyze and act on conversation data delivers a powerful advantage. It reveals hidden performance gaps, highlights opportunities for improvement, and connects CX directly to operational decisions.

Organizations that employ these insights are going to be better positioned to deliver efficient service, strengthen customer relationships, and generate measurable business results.

In an increasingly automated world, understanding the human conversations at the center of the CX may be one of the most valuable capabilities a contact center can develop.

Lee Barth is vice president of enterprise sales at Marchex, where he works with organizations to improve customer acquisition and engagement through greater visibility into voice interactions. He has extensive experience helping enterprises optimize contact center performance and customer experience.

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Contact Center Pipeline

BY FRANK PALERMO, NEWROCKET

ILLUSTRATION PROVIDED BY ADOBE STOCK

CONTACT CENTER AI IS INHERITING A DATA CRISIS

HERE'S HOW TO MANAGE IT.

AI has quickly become a defining investment priority for contact center leaders. Organizations are deploying virtual agents, automated quality management (AQM), real-time agent assistance, conversation intelligence, predictive routing, and generative call summaries.

The potential is significant. Contact centers produce enormous volumes of customer intelligence every day, including direct signals about customer intent, product issues, agent performance, operational friction, and emerging business risks.

The greatest obstacle to realizing that potential is rarely the model itself. The more persistent threat is the condition of the data surrounding it.

AI projects often expose years of fragmented systems, inconsistent definitions, unclear ownership, and weak governance practices.

A model can process information at tremendous speed, but it cannot independently repair the operational history embedded in that information. When the underlying records are incomplete, contradictory, or poorly governed, AI scales those weaknesses across the contact center.

That creates a difficult reality for leaders. The success of the next generation of contact center technology will depend heavily on data management decisions that many organizations have postponed for years.

CONTACT CENTER DATA WAS *NEVER* DESIGNED FOR AI

Most contact center data environments were developed incrementally.

- Telephony platforms were implemented to route and record calls.
- CRM systems were added to manage customer records and cases.
- Workforce management (WFM) platforms handled forecasting and scheduling.
- Quality management systems evaluated agent performance.
- Chat, email, social media, and messaging platforms arrived as customer channel preferences expanded.

Each system was generally purchased to solve a specific operational need. *But few of them were designed to provide AI with a complete, reliable, and continuously updated view of the customer journey.*

This fragmentation creates immediate challenges when organizations attempt to connect data across platforms.

A single customer issue may produce a call recording, transcript, chatbot conversation, CRM case, agent note, authentication record, quality score, and billing adjustment.

These records may use different identifiers. They may have different timestamps, ownership rules, and retention schedules.

Some systems will record that the case was closed, while others may show that the customer contacted the company again the following day.

An AI application must somehow determine which records belong together, what happened during the interaction, and whether the customer's underlying problem was actually resolved.

That becomes difficult when the organization itself lacks a consistent answer.

- Terms such as "resolution," "escalation," "conversion," and "customer intent" often carry different meanings across teams and platforms.
- One department may classify an interaction as resolved when the agent closes the case. Another may require confirmation that the customer's issue was permanently corrected. A digital channel may use an entirely different taxonomy.

These differences may appear minor in a dashboard or monthly report. But once AI begins using them to recommend actions, evaluate agents, or automate customer conversations, they become operationally significant.

AI MAKES DATA PROBLEMS MORE EXPENSIVE

Poor data quality has always affected contact center performance. It contributes to inaccurate reporting, weak forecasting, and inconsistent customer experiences (CXs).

AI increases the scale and speed of the impacts:

- An AQM system may evaluate every customer interaction rather than a small sample of them.
- An agent-assist tool may produce recommendations during thousands of conversations each day.
- A virtual agent may communicate directly with customers without a human reviewing every response.

When the inputs are unreliable, the resulting error(s) can spread quickly.

Consider an agent-assist system recommending a retention offer. The system may have access to the current transcript, product documentation, and selected CRM fields. But it may lack a recent billing adjustment, an unresolved complaint, or updated eligibility rules. Consequently:

- The recommendation can still sound polished and highly specific, even though critical context is missing.
- The presentation of confidence can make the recommendation more persuasive than the underlying data warrants.

Generative summaries create a similar risk. A summary may omit a commitment made by the agent, misidentify the cause of the call, or incorrectly state that the issue was resolved.

If that summary becomes part of the official customer record, future agents and systems inherit the mistake. Over time, organizations may begin training, evaluating, or grounding AI information generated by earlier AI systems.

Consequently, one error becomes a source for another. Without clear labeling and lineage, machine-generated interpretations can gradually become indistinguishable from original customer data.

This creates a self-reinforcing data problem. The organization may believe it is learning from customers when it is increasingly learning from its own (including flawed) automated outputs.

UNSTRUCTURED DATA CARRIES HIDDEN RISKS

The most valuable contact center data is often unstructured. Call recordings, transcripts, chat messages, emails, screen recordings, and free-form agent notes contain far more context than traditional disposition codes.

These sources can reveal customer sentiment, emerging product defects, recurring service failures, and the reasons customers abandon transactions. But they can also contain highly sensitive information.

Customers may disclose payment details, medical information, account credentials, financial hardship, or personal circumstances during a conversation.

Agents may repeat that information and enter it into notes or copy it into fields that were never built to hold sensitive data or meet the compliance requirements that govern it.

Many agents also receive little or no training on which details qualify as sensitive or how those details are supposed to be handled once captured: which means the exposure often begins well before the data ever reaches an AI system.

Once an interaction is transcribed, that information becomes searchable and easier to distribute. A detail buried in an audio recording can suddenly appear in a data lake, analytics platform, model prompt, generated summary, or third-party processing environment.

Many enterprise data governance programs were built around structured databases. Those environments typically have defined fields, access controls, and retention policies. A customer conversation is much less predictable. Sensitive information can appear at any point and in any format.

EVERY MAJOR CONTACT CENTER DATA DOMAIN SHOULD HAVE A CLEARLY ACCOUNTABLE OWNER.

Contact center leaders therefore need to understand exactly how unstructured data moves through the AI lifecycle.

- Which recordings are being transcribed?
- Where are the transcripts stored?
- Are sensitive details redacted before they reach the AI application, whether that is a generative summarization tool, an agent-assist model or an analytics engine, and at what stage in the pipeline does redaction happen?
- Are prompts and outputs retained by a technology provider?
- Can the data be used to improve a third-party model?
- How are recordings, transcripts, summaries, and embeddings deleted when the retention period expires?
- Which regulations apply to this data (for example, industry-specific rules or regional privacy laws). Can the organization demonstrate compliance with each one across every system the data touches?

An organization that cannot answer these questions has limited control over one of its most valuable and sensitive data assets.

CONSENT NEEDS TO FOLLOW THE INTERACTION

Consent is another area where legacy contact center practices collide with modern AI use cases.

A customer may hear a notice stating that a call will be recorded for quality or training purposes. But organizations should not assume that this language provides unlimited permission for future analysis, model training, or automated decision-making.

The challenge grows when data moves across platforms or external providers. The recording system may document that a notice was played, but the transcript sent to an analytics environment may not include that consent record.

Here's the risk: once the interaction enters a broader data repository, the restrictions governing its use can become difficult to trace. That does not, however, transfer accountability.

The organization that originated the data generally remains responsible for how it is used downstream, including compliance, even after the data has passed through a third-party platform or model. Contractual terms with vendors should make that responsibility explicit rather than leaving it ambiguous.

Consent should travel with the data. Interaction records need metadata that identifies how the information was collected, what uses are permitted, which jurisdiction applies, how long the data can be retained, and whether any sensitive information is present.

These controls should remain attached as the data moves between systems, states, countries, and their provinces or states. Recording requirements, privacy rights, data residency obligations, and restrictions on automated processing can vary by jurisdiction.

Organizations need governance mechanisms that apply these requirements consistently rather than relying on employees to interpret them during individual interactions.

THE GOVERNANCE GAP IS AN OWNERSHIP GAP

Technology alone will not resolve these issues because many of the underlying problems involve accountability.

In numerous organizations, responsibility for contact center data is distributed across Operations, IT, Security, Legal, Compliance, Analytics, and CX teams. Each group owns part of the environment. Few own the complete lifecycle.

- The contact center may determine which fields agents complete.
- IT manages the platforms.
- Legal defines retention policies.
- Security manages access.
- Analytics teams transform the data.

An external provider may process the information through an AI model. But when an output is inaccurate or challenged, responsibility becomes unclear.

Contact center leaders need a formal role in data governance because they understand how the information is produced in practice.

They know why agents skip fields, when disposition codes are unreliable, and how transfers create duplicate or incomplete interaction records.

They also understand that a closed case may still represent an unresolved customer problem. That operational context is critical when determining whether data is suitable for AI.

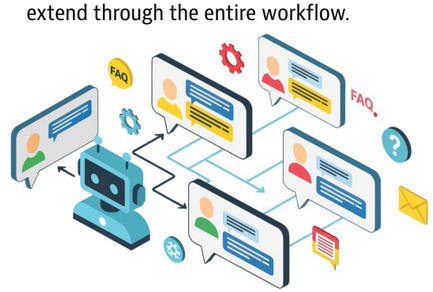
Every major contact center data domain should have a clearly accountable owner. That individual or team should define what the data means, how its quality is measured, who may use it, and how errors are corrected.

Organizations also need reliable data lineage. Leaders should be able to identify where information originated, how it was transformed, and which systems or models used it. When an AI recommendation is questioned, the organization should be able to reconstruct the relevant inputs and rules.

GOVERNANCE MUST REACH THE WORKFLOW

Many AI governance programs focus heavily on model approval. Teams review a model's accuracy, security, vendor terms, and technical architecture before deployment.

Those reviews are valuable, but model-level controls cannot compensate for weak operational data. Governance must extend through the entire workflow.



A contact center should know which data enters an application, how frequently it is updated, what happens when information conflicts, and which sources have priority.

Leaders should define when a human must verify an output, how suspected errors are reported, and what happens when model performance declines.

These controls need to be embedded directly into systems and processes. For example:

- An AI tool should be prevented from displaying an offer to an ineligible customer.
- Sensitive information should be redacted before it reaches the AI application processing it, whether that application generates summaries, powers agent-assist recommendations, or feeds an analytics model.
- A generated summary should be labeled as machine-produced.
- High-impact recommendations should require human validation.

Data outside its approved retention period should be deleted across recordings, transcripts, derived datasets, and model indexes.

A policy document cannot enforce these protections on its own. Technical controls and operational workflows must carry the governance burden.

START WITH THE DECISION, THEN EXAMINE THE DATA

Contact centers do not need to repair every historical data issue before implementing AI. They do need to understand which data problems could compromise a particular application. The most effective starting point is the decision the AI system will influence.

Leaders should define what the system is expected to do, who will rely on the output, and what happens when the output is wrong. They can then identify the minimum data required to support each use case responsibly.

The required standard should reflect the consequences of failure.

- A low-risk application that categorizes general call topics or tags interactions by subject for reporting purposes, may tolerate occasional errors.

  That is because a mistake mainly affects internal analytics rather than the customer directly.

- A high-risk application, one that determines customer eligibility, provides financial or medical information, or recommends actions for vulnerable customers, requires stronger data validation, monitoring, and human oversight.

  That is because an error there can directly affect a customer's finances, access to service, or wellbeing.

Organizations should also examine whether the data represents the full customer population.

- Historical interaction records may underrepresent certain languages, channels, demographic groups, or types of customer problems.
- A model trained on that history may perform well for common interactions while producing weaker results for customers whose needs appear less frequently in the data.

Continuous monitoring is essential because data environments change.

- Products are updated, policies shift, channels expand, and customer behavior evolves.
- A model that performed well during testing can degrade as its inputs move away from the conditions under which it was evaluated.

DATA DISCIPLINE WILL SEPARATE AI LEADERS FROM EXPERIMENTERS

Contact center AI will continue to advance:

- Virtual agents will handle more complex requests.
- Human agents will receive richer contextual support.
- Leaders will gain access to insights that previously remained buried across millions of customer conversations.

The organizations that benefit most will approach data as operational infrastructure.

- They will establish consistent definitions, preserve consent, track lineage, identify machine-generated content, and assign clear ownership.
- They will connect governance controls to actual workflows rather than relying solely on policies and review committees.

THE COMPANIES THAT ADDRESS THESE ISSUES NOW WILL BE POSITIONED TO USE AI WITH GREATER CONFIDENCE...

AI is forcing contact centers to confront data weaknesses that have accumulated through years of platform expansion and fragmented ownership. That pressure can be productive. It gives leaders an opportunity to create a more reliable foundation for customer service, analytics, and automation.

The companies that address these issues now will be positioned to use AI with greater confidence and at greater scale. But those that continue building on fragmented and poorly governed data will find that every new AI capability introduces another layer of operational risk.

Frank Palermo is the Chief Operating Officer of NewRocket, where he helps guide the company's growth strategy and strengthens its position as a leading advisor in digital workflows, AI, and enterprise transformation. He brings decades of experience building and scaling technology and consulting organizations.

BY SCOTT KENDRICK, CALLMINER

ILLUSTRATION PROVIDED BY ADOBE STOCK

WHAT WILL *YOU* BE MEASURED ON?

TO SUCCEED, YOU NEED TO TREAT CUSTOMER CONVERSATIONS AS INVALUABLE ASSETS.

Years ago, a manufacturer of protective phone cases had a support volume problem:

- Customers were calling about the charging port cover because it wasn't intuitive, didn't always seat properly, and, in some cases, failed.
- Calls led to troubleshooting, then to replacement cases and, for the company's waterproof products, potential phone warranty exposure.

The root cause existed in exactly one dataset in the company: *what customers said on the phone*. It wasn't in returns data, wasn't on warranty forms, and it wasn't in the ticket taxonomy. Nobody was filing a report that said the cover design was confusing. Instead, customers were describing the problem in their own words to the agents.

Conversation analysis then surfaced the issue; the finding went to Product Design and to Manufacturing, and the product changed.

The company reportedly avoided millions in warranty claims, but the more lasting change was procedural: product teams started coming to the contact center *first* because they understood that customer conversations contained intelligence the rest of the organization couldn't always see.

This incident happened years ago, not as a pilot or proof of concept, but as normal work for a company that was simply paying attention.

REMOVING BARRIERS TO OBTAINING INTELLIGENCE

I started my career in a contact center supporting customers for a software company before moving into product management, so I knew from both sides what product managers were missing and what support conversations already contained.

The barrier was *never* technical feasibility as much as the effort, specialization, and imagination required to determine what the data could answer.

As those barriers fall, the question for contact center leaders shifts as well. It's becoming less about how efficiently the contact center is staffed and more about whether technology investments are delivering better customer and business outcomes.

The pattern also goes back decades.

Roughly 20 years ago, a cable operator used speech analytics not for quality monitoring (QM), but to detect signal degradation in specific service areas and quantify what that degradation was doing to customer satisfaction.

That was network intelligence derived from conversations.

- The case manufacturer I mentioned earlier turned them into product design intelligence.
- More recently, a direct-to-consumer pet supply company traced a cluster of low-star Amazon reviews back to a root cause identified in support calls and changed the product.

In each case, the organization wasn't simply asking how efficiently the contact center handled an interaction; it was asking what those interactions could tell the rest of the business.

HOW AI MAKES A DIFFERENCE

What's actually new isn't the capability. Organizations have been doing this for years. The value of that intelligence has been demonstrable for a long time.

What's changed recently is that AI has made it dramatically easier and faster to understand what's inside the data, while raising general awareness that this understanding is even possible.

> **WHAT'S CHANGED RECENTLY IS THAT AI HAS MADE IT DRAMATICALLY EASIER AND FASTER TO UNDERSTAND WHAT'S INSIDE THE DATA...**

Historically, extracting meaningful insight from large volumes of customer conversations required setup time, specialized expertise, and a fairly clear idea of what you were looking for in advance.

AI changes that equation, reducing the specialized skills and time to surface insights. Through faster analysis, organizations gain a broader ability to understand why customers are contacting the business, where recurring issues may be taking shape, and more.

Conversation data also becomes more accessible beyond the contact center. Product, Marketing, Operations, and other teams can use AI to easily interact with conversational data to identify themes and trends in customer feedback that would have only been accessible to specialized teams.

The underlying customer signals were always there; AI is lowering the effort required to find them, connect them, and put them to use across the business, truly democratizing intelligence.

THE CONTACT CENTER IS ONE OF SEVERAL INTELLIGENCE SOURCES

The key to delivering those outcomes is ensuring that you are tapping all possible sources of data from which you extract intelligence and actionable insights.

The contact center is one of the richest sources of voice of the customer (VOC) insight, but it isn't the only source.

Organizations should instead be aggregating contact center interactions with every other stream of customer interaction and feedback, including digital, survey, review, chat, field, and sales data.

This is especially important in large enterprises with multiple contact centers, multiple BPOs, and dozens of customer touchpoints, each holding only a partial view.

Every channel holds valuable customer signals, but the insights become even more powerful when those signals are connected across channels and feedback sources. Fragmentation, not scarcity, is the real obstacle.

There is a competitive dimension to this as well. Algorithms are purchasable, and models are licensable, but your customer interaction data can't be replicated by a competitor. *That's the durable asset.*

When an organization genuinely makes this shift, ownership of conversation intelligence begins to migrate beyond the contact center and becomes a capability serving Product, Marketing, Billing, Compliance, and Operations.

If the intelligence still begins and ends with contact center operations, there is considerably more value to unlock, regardless of how much the organization has invested in technology.

INTELLIGENCE EARNS YOU THE RIGHT TO BE PROACTIVE

There is significant focus now on predictive systems that can detect early signs of churn or disruption and initiate outreach automatically, with success increasingly measured by problems avoided rather than problems resolved quickly.

That is an important shift, but it's worth stating what makes it possible: you cannot prevent what you haven't diagnosed. Proactive outreach without root-cause intelligence is just more outbound noise, and customers have little patience for interactions that don't address something they actually need.

The progression moves from reacting to a customer's issue, to understanding their intent, to predicting what they may need next, and ultimately to preventing the issue from arising in the first place. Each stage requires more understanding of why contact happens, not just how much of it there is.

Inbound volume isn't simply a workload number; it is often a lagging indicator of upstream breakdowns in product, communication, billing, and policy.

The port cover I discussed at the beginning of this article is the cleanest possible example because the calls themselves weren't the fundamental problem.

Instead, the calls were evidence of a product problem that happened to surface in the contact center. Understanding that distinction allowed the organization to address the cause instead of simply becoming more efficient at handling the symptoms.

What's genuinely new is the economics. Near-zero marginal cost per conversation makes net-new engagement viable, whether that's proactive notification, preemptive explanation, or confirmation at moments of uncertainty.

IF AI AGENTS ARE A WORKFORCE, MANAGE THEM LIKE ONE

The labor shift that comes with this automation is AI absorbing more predictable and rules-based work while humans concentrate on judgment, emotion, and interactions with real value at stake.

We've seen a version of this transition before. Quality assurance (QA) staff who once spent their days listening to call samples became business analysts as automated quality processes expanded coverage across interactions and produced VOC intelligence for product, retention, and other teams.

The job didn't disappear; it moved up, and we should expect a similar progression as humans increasingly move from doing every task themselves to supervising, orchestrating, and correcting a virtual workforce.

If we take the idea of AI agents as a workforce seriously, however, the implications are uncomfortable.

We hold human agents to a genuinely rigorous standard through quality monitoring, scored evaluations, calibration sessions, coaching plans, performance reviews, and remediation.

We can deploy a virtual workforce handling comparable or greater volume and evaluate it primarily with a containment percentage and a dashboard from the system running it.

AI agents need the same operating discipline, including quality monitoring (QM) against defined standards, structured feedback loops, continuous improvement driven by what's failing in production rather than what was anticipated at design time, and human oversight where the stakes are high.

Outcome-based pricing makes this measurement issue even more important. The concept is reasonable, but it only works when the outcome can be measured properly and independently.

When a vendor's revenue depends on its own performance grade, and that grade is calculated primarily from data the vendor alone holds, the structure makes meaningful validation difficult, not because anyone is acting in bad faith, but because independent measurement matters.

There is an even larger visibility problem because an automation system typically sees only its slice of customer interactions.

It may not see what happened when the customer called back the next day, churned the next month, or reached a human through another channel with the same unresolved issue.

Judging resolution requires visibility into the journey around the automation, not just the automation itself.

You can't grade an agent's work using only that agent's own record of it, whether the agent is human or virtual.

But done right, virtual and human interactions should flow into the same analytics environment, be scored on the same terms where appropriate, and produce a single performance lens across the entire workforce, with what is learned feeding improvements back into the automation.

These aren't necessarily automated versions of existing calls; they're conversations that were never affordable before.

But the goal shouldn't simply be deflecting demand from a human to an automated channel. It should be understanding why the demand exists and, where possible, eliminating it. The highest-value conversation may be the one the customer *never* needs to have.

THE MEASUREMENTS THAT MATTER

Containment quality, automation accuracy, and reduction of downstream rework are all useful measurements, but downstream rework points toward something much bigger: the value created by the contact center often shows up somewhere other than the contact center.

Go back to the port cover. Those calls were effectively invisible to the metrics the contact center owned because they looked like routine troubleshooting on its dashboards.

The real value surfaced as warranty claims avoided, in another department's profit-and-loss (P&L) statement, on another team's budget line, months later. The measurement that mattered wasn't a contact center measurement at all.

Accuracy raises a similar question: *accurate against what standard?* An AI agent can execute a designed flow with high fidelity and still be walking customers down a path that was never the best route to resolution.

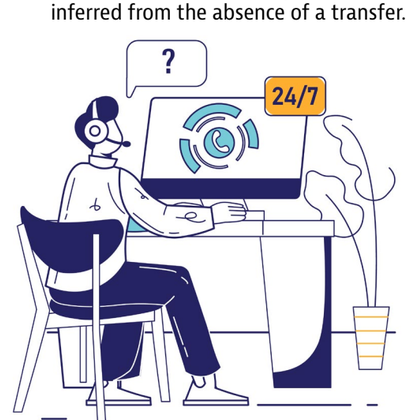
Accuracy without a ground truth derived from real conversations measures compliance with our assumptions, not necessarily effectiveness. Containment has the same limitation.

The risk isn't the metric's existence, but what it counts. Containment records where the interaction stayed; it says nothing on its own about whether the customer's need was met.

I would put three questions at the center of measurement.

1. Was the need actually resolved?
2. Did it resurface?
3. How much effort did it take?

Resolution should be verified through conversation intelligence or contextual post-interaction follow-up rather than inferred from the absence of a transfer.



> ***YET THAT AVOIDED INTERACTION MAY REPRESENT MORE VALUE THAN MAKING THE ORIGINAL CONTACT CHEAPER OR FASTER TO HANDLE.***

Organizations should also know whether the same issue, for the same customer, resulted in another contact within the next 24 or 48 hours, including through another channel, which requires journey-level visibility.

Finally, repeated explanations, escalation requests, and channel switching all provide important measures of effort, which can help distinguish a resolved contact from a survived one.

We've run the experiment of optimizing around easy measurements before. Average handle time (AHT) was easy to measure and easy to report.

But when organizations over-optimized around it, agents could be pushed to rush customers, avoid research, and dodge escalations.

Easy-to-measure has beaten meaningful-to-measure before, with the costs eventually showing up downstream as repeat contacts, increased effort, and churn.

AHT is a good example: optimizing for shorter calls could make performance look better on paper while driving repeat contacts, greater customer effort, and churn.

Escalation was never inherently failure; it's adaptation, and metrics should reward it when it's the right call.

The same caution should apply to AI, because if we optimize primarily for keeping customers inside automated experiences, systems may become very good at containment without becoming equally good at resolution.

MEASURE THE DEMAND THAT NEVER OCCURRED

There is another measurement that is harder to see but potentially much more valuable: *demand that never occurred.* Reduction in downstream rework points directly toward it.

When customer intelligence helps an organization identify a confusing product feature, fix an unclear policy, improve a communication, or intervene before a known problem occurs, a future interaction may disappear entirely.

Preventable demand is difficult to measure because nobody gets credit for the call that didn't happen unless someone deliberately builds the baseline to claim it.

Yet that avoided interaction may represent more value than making the original contact cheaper or faster to handle. To address this, establish a baseline for repeat or avoidable contacts, link those interactions to their root causes, and track whether volumes decline after process changes.

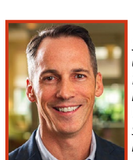
That is why the measurement challenge matters so much today and especially going forward.

The difficulty isn't new technology arriving; it's the business change that several years of technology have forced, and the reckoning is with what we choose to count.

The port cover insight was available years ago to any organization willing to look at what customers were already telling them. What's changed is that looking has become far easier and far more widely understood as possible, which means the excuse for not measuring what matters is disappearing.

Get the measurement right, and the contact center becomes an intelligence source capable of helping the enterprise become more proactive, prevent problems, and generate value well beyond customer service.

Get it wrong, and we risk spending the back half of the decade unwinding a new generation of metrics that are optimized for the spreadsheet rather than the customer.



Scott leads CallMiner's strategy, growth, market expansion, and strategic partnerships, with a focus on accelerating adoption of conversation intelligence and AI-powered automation. With 30 years of experience spanning software strategy, product management, and marketing, he previously held senior leadership roles at MIVA and Corel Corporation.

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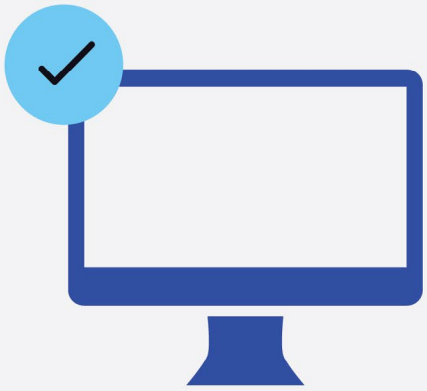

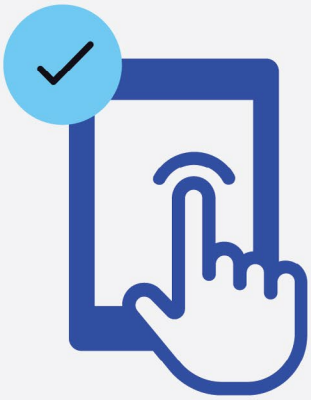

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