

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)

How Best to Serve LATAM Customers

BY PABLO ROSSEL ESTAY

<https://bit.ly/3W4bTLb>



Can AI Pass The Checkpoints?

BY BRAD MURDOCH

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



CCP BLOG'S
TOP 5
MOST POPULAR
POSTS FROM
OCTOBER



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The AI-Human Balancing Act

BY DINA VANCE

<https://bit.ly/4zdWuX3>

The Extra Mile Has Rules

BY MARK PEREIRA

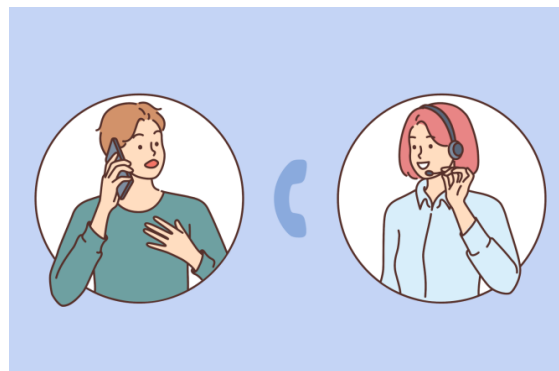
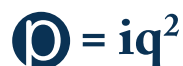
<https://bit.ly/48kfCqF>

The Human Touch Paradox

BY CLOUD TECH GURUS

The contact center industry is experiencing a fascinating contradiction in 2026. While enterprises race to deploy AI agents and automation at unprecedented scale, a quieter revolution is unfolding: **human service is being repositioned as a premium offering**, and it's working.

<https://bit.ly/4k4261J>



SMART INSIGHTS AND PRACTICAL ADVICE FOR THE CONTACT CENTER

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THOUGHT YOU SHOULD KNOW

A MONTHLY DOSE OF FACTS & FIGURES FROM INSIDE THE ISSUE



\$3

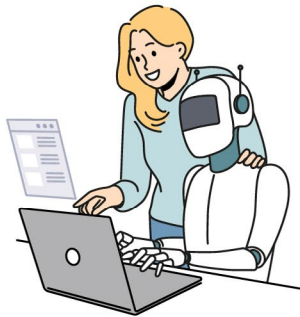
Gartner's January 2026 analysis projects generative AI cost per resolution passing \$3 by 2030, potentially exceeding the cost of an offshore human agent.

SOURCE
CUSTOMER EXPERIENCE:
DRIVING THE BOUNCY
CX JOURNEY
By Brendan Read; Q&A With
Expert Panel
[#CUSTOMEREXPERIENCE](#)

14%

Gartner research (eesel AI) puts AI deflection above 45% of incoming queries, while only about 14% of deflected queries reach full self-service resolution.

SOURCE
METRICS:
DEFLECTION IS **NOT**
RESOLUTION
By Rob Dwyer
[#METRICS](#)



73%

Contact centers already struggle to use the data they collect: 96% record calls but 73% don't have time to analyze them.

SOURCE
QUALITY ASSURANCE:
WHY QA HAS TO
CHANGE
By David Karandish
[#QUALITYASSURANCE](#)

\$596 billion

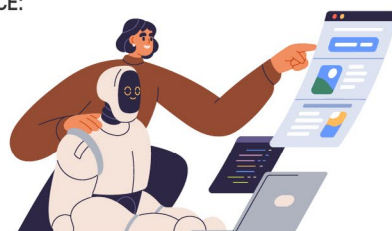
CCMC and Arizona State estimate that more than \$596 billion in revenue is at risk from poor complaint handling.

SOURCE
CUSTOMER EXPERIENCE:
DRIVING THE BOUNCY
CX JOURNEY
By Brendan Read; Q&A With
Expert Panel
[#CUSTOMEREXPERIENCE](#)

8-15

Multipliers of between eight and 15 problems for each complaint voiced were found in a survey of 8,000 consumers by major consumer product goods (CPG) companies.

SOURCE
VOICE OF THE
CUSTOMER:
ENHANCING THE VOC
PROCESS - PART 2
By John Goodman, with
Thomas Hollmann, Bill Price,
and David Beinhacker
[#VOICEOFTHECUSTOMER](#)



FROM THE PIPELINE

We are in the midst of gratitude season. Canada celebrated Thanksgiving in October, and our holiday in the U.S. is this month.

I think it can be difficult to feel gratitude when we look around. Many things in our world, in our communities, our contact centers, and our individual lives can sometimes make it difficult to see the good things around us.

As I was recently reminded, the darkest skies have the brightest stars. Yes, we have long queues. We have tech implementation issues. We have hiring and retention struggles. BUT we also have well-served customers. We have technologies that have made processes easier. And we have some of our brightest stars because we struggled through our hiring processes. Keep looking around...at the good things!

Happy Gratitude Season.

Enjoy our November issue.

Linda Harden



LINDA HARDEN
Publisher
Contact Center Pipeline

Hello Autumn

EXECUTIVE INTERVIEW

BY LINDA HARDEN



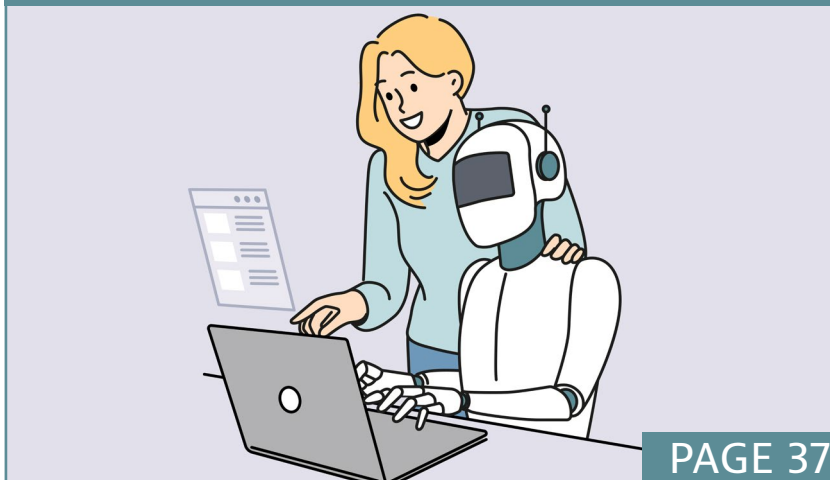
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EXECUTIVE INTERVIEW WITH NITESH KUMAR

SPONSORED BY FLATWORLD SOLUTIONS.

QUALITY ASSURANCE

BY DAVID KARANDISH



PAGE 37

WHY QA HAS TO CHANGE

AI IS FORCING NEW AUTOMATED PROCESSES.

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NOVEMBER '26

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pipeline

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HOW TO KEEP THE CX FLOWING SMOOTHLY

GAS SOUTH'S HUMAN-CENTERED, TECHNOLOGY-ENABLED APPROACH.



ILLUSTRATION PROVIDED BY ADOBE IMAGES

Few customer experiences (CXs) are more important than those delivered by energy companies, such as natural gas suppliers.

These businesses must meet the critical needs of individual residential and organizational customers, providing heat, fuel for ovens and stoves, electricity, energy for commercial and industrial processes, and vehicle propulsion. They must also serve entire communities, like where their employees live.

With natural gas supply deregulated in some states, like Georgia, customers can switch suppliers or minimize or even end their gas use by going to alternative energy sources, such as electricity, oil, and propane, if they become dissatisfied.

JENNI HAWKINS



On the flip side, should electricity, oil, and propane customers become dissatisfied with these sources and their suppliers, natural gas is an option, provided it can readily be connected to their premises and if they are willing to invest in gas-powered appliances, heating, and other systems.

While natural gas delivery by local distribution companies is highly reliable, wholesale market conditions, weather, and customer usage can cause gas costs and customer bills to fluctuate (also see **BOX**).

The connection point to the customers is the contact center. The ability of agents to authentically understand and respond to their issues is critical to maintaining their loyalty. That also means ensuring that the agents remain connected and protected.

THE GAS SOUTH STORY

Gas South is a leading natural gas supplier headquartered in Atlanta, Georgia. The company serves nearly 500,000 residential, commercial, industrial, and wholesale customers across several southern, mid-Atlantic, and midwestern states.

Founded in 2006, Gas South, a subsidiary of Cobb EMC, utilizes gas distribution companies, notably Atlanta Gas Light, to deliver the fuel to its customers' premises.

The company's mission, according to Jenni Hawkins, Vice President of Customer Care, Gas South, "is to be the energy provider of choice by delivering exceptional value, service, and simplicity.

"We are also purpose-driven: giving back 5% of our annual profits to organizations that support children in need. That commitment to being a 'Fuel for Good' is central to who we are and how we serve our customers and communities."

To learn more about how Gas South does just that, enabled and assisted by its contact center teams, I had a virtual conversation with Jenni.

Q WHAT ARE THE KEY CHALLENGES, BUT ALSO THE OPPORTUNITIES, YOU HAVE IN RETAINING/MAINTAINING THE LOYALTY/REFERRAL PROPENSITY OF YOUR CUSTOMERS? IN GROWING YOUR CUSTOMER BASE AND REVENUES?

A: In a deregulated natural gas market, customers can switch providers, subject to their contract terms, so loyalty isn't a given: it's earned through trust, transparency, and exceptional, people-first service.

We operate in an environment where fluctuating natural gas markets can drive price volatility, and cold weather can lead to higher usage and affordability concerns for customers. That makes it critical to deliver not just competitive rates, but also clarity and support.

We differentiate with consistently competitive and transparent pricing: no deposits, no hidden fees, and no surprises on our bills.

Just as importantly, we differentiate through the service experience. Our team members are highly skilled at helping customers select the right plans and navigate any financial challenges through flexible payment options and connections to support resources.

We are also committed to responsiveness – answering 85% of calls within 90 seconds in 2025 – which reinforces our brand as accessible and customer-focused.

The results are measurable, with strong customer satisfaction, thousands of 5-star Google reviews, and continued market share growth.



AT A GLANCE

1. HOW MANY AGENTS DO YOU HAVE?

-- Approximately 100

2. WHAT IS YOUR CONTACT VOLUME (ANNUALLY)?

-- 700,000-plus contacts

3. WHAT IS THE SPLIT BETWEEN INBOUND AND OUTBOUND?

-- Mostly inbound, with some targeted service outreach occasionally

4. WHAT IS THE SPLIT BETWEEN INBOUND CHANNELS?

--87% phones, 6% chat, 7% email

5. ARE YOUR AGENTS IN-HOUSE OR OUTSOURCED AND IF SO, WHAT IS THE SPLIT?

--100% of frontline, customer-facing agents are in-house

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

--Agents are hybrid following in office new-hire training, coming into the office monthly for engagement day activities like training, team meetings, business updates, leader roundtables, socials, and community service.

7. WHERE ARE YOUR ON-PREMISE AGENT CONTACT CENTERS AND REMOTE AGENTS LOCATED?

--Atlanta, Georgia and Gainesville, Florida

8. WHAT ARE THE KEY CONTACT CENTER TECHNOLOGIES THAT YOU USE?

--Oracle Customer Information System, Five9 phone system, Verint Workforce Management, PowerBI for reporting/dashboards

Q OUTLINE YOUR CUSTOMER CARE OPERATIONS. WHAT CHANNELS DO YOU USE TO ENGAGE WITH YOUR CUSTOMERS?

A: We operate in a fully omnichannel environment, supporting more than 700,000 customer contacts annually across phone, email, chat, and digital channels.

While 87% of our interactions are still voice-based, we continue to invest in robust self-service capabilities through our website, mobile app, automated phone system, and chatbot for easy transactions for customers who prefer ease, speed, and convenience.

At the same time, we make it intentionally easy to connect with a live agent: because we know that for complex or sensitive situations, a human connection matters most.

Our Customer Care team supports the full lifecycle of the CX, including enrollment for service, plan selection, renewals, billing inquiries, payments, and transfer service from one location to another.

We think about customers and where they are, offering extended hours including evenings and Saturdays, while ensuring consistent, reliable support across all channels.

"...WE MAKE IT INTENTIONALLY EASY TO CONNECT WITH A LIVE AGENT: BECAUSE WE KNOW THAT FOR COMPLEX OR SENSITIVE SITUATIONS, A HUMAN CONNECTION MATTERS MOST."

-- JENNI HAWKINS

Q LET'S DISCUSS FURTHER YOUR CONTACT CENTER. WHAT FUNCTIONS DOES IT PROVIDE? HOW DO YOU DECIDE WHICH CONTACTS ARE HANDLED BY AUTOMATED AGENTS VERSUS LIVE AGENTS?

A: Customer Care provides end-to-end support while contributing to growth through new customer acquisitions and partnerships such as Gas South Advantage, which brings our customers additional value with discounts on home services.

We take a human-centered, technology-enabled approach to service. We think about contact handling in three tiers:

1. Self-service for ease, speed, and convenience.
2. Assisted service for efficiency and expertise.
3. Human interaction for our people-first approach of empathy and trust.

Automation is used where it enhances the CX: handling simple, transactional needs such as payments, service transfers, and account management.

However, we intentionally prioritize live agents for complex or sensitive interactions, such as high bill concerns, financial hardship situations, and nuanced customer questions.

Our agents are direct hires, trained in-house, and deeply connected to the customers we serve. That local understanding allows them to provide personalized, empathetic support that technology alone can't replicate.

Q HOW DO YOU SUPPLY YOUR LIVE AGENTS? IN-HOUSE? BPO? WHERE AND HOW (ON-PREMISE, REMOTE)?

A: We made a deliberate decision to operate with a 100% in-house, community-based workforce. We believe CX is too core to our mission, purpose, and values to outsource.

Our agents live in the communities we serve, which enables them to relate more authentically to our customers and understand local nuances. This approach strengthens both CX and our connection to the community.

Our Customer Care organization operates across two primary locations – Atlanta, Georgia and Gainesville, Florida – with a hybrid workforce model.

Team members primarily work remotely once proficient following new hire training. Agents come into the office monthly for face-to-face recurrent training, collaboration, engagement activities, and community service.

Q WHAT FACTORS LED TO YOUR STRATEGY? WHEN AND HOW DID YOU EXECUTE IT? WHAT WERE YOUR GOALS? WERE THERE ANY CHALLENGES AND IF SO, HOW WERE THEY OVERCOME? WHAT WERE THE RESULTS, AND HOW DID THESE COMPARE WITH YOUR EXPECTATIONS?

A: One of the most transformational decisions in our company's history was bringing Customer Care fully in-house, which we did in 2012.

By transitioning to a direct-hire model, we aligned our frontline teams more closely with our mission, purpose, values, and customer expectations. This shift resulted in stronger hiring outcomes, reduced attrition, deeper expertise through tenure and in-house training, and a more cohesive culture.

Since implementing this strategy, we have continuously invested in creating a distinct, values-based CX. The results have exceeded expectations with record levels of customer satisfaction, sustained business growth, and consistently strong employee engagement scores.



Our agents feel connected to the company's mission and are supported through competitive compensation, career development opportunities, and unique benefits such as sabbatical and profit-sharing programs. This investment in our people has been a key driver of our success.

Q HOW DO YOU HIRE/RECRUIT, TRAIN, COACH, ENGAGE, AND RETAIN YOUR AGENTS? MANAGE AGENT SCHEDULING AND ADHERENCE? ARE YOUR METHODS WITH COMMUNITY-BASED AGENTS DIFFERENT FROM THOSE IN OTHER DEPLOYMENT/LOCATION TYPES AND IF SO, HOW, AND WHY?

A: Because all our agents are Gas South employees, we hire for both skills and mindset: prioritizing customer focus, transparency, empathy, teamwork, and adaptability.

Training is delivered in-house using internal resources, structured materials, and peer mentoring. New hires are supported by experienced trainers who routinely serve customers to remain proficient themselves and other seasoned peers, accelerating both learning and cultural integration.

Ongoing coaching is a critical component of our model. Leaders provide feedback in regular one-on-ones, supported by performance dashboards that give agents visibility into their strengths and opportunities.

We invest heavily in tools and resources, including a user-friendly knowledge base and emerging AI technologies that streamline processes and reduce manual work, allowing agents to focus on meaningful customer interactions.

Operationally, we have expectations around reliability and schedule adherence but we also strive to provide flexibility so that agents can manage their personal and work lives.

We also prioritize engagement and recognition. Programs such as our Excellence Expedition program celebrate top performers and create opportunities for cross-location connection with peers and leaders to show appreciation for outstanding performance.

"OPERATIONALLY, WE HAVE EXPECTATIONS AROUND RELIABILITY AND SCHEDULE ADHERENCE BUT WE ALSO STRIVE TO PROVIDE FLEXIBILITY SO THAT AGENTS CAN MANAGE THEIR PERSONAL AND WORK LIVES."

Q HOW DO YOU PROTECT YOUR COMMUNITY-BASED AGENTS FROM OUTAGES? IN DISASTERS? SHOULD THE AGENTS HAVE TO EVACUATE, AND UNDERSTANDING YOUR CONTACT VOLUME MAY LIKELY SPIKE IN SUCH EVENTS, HOW DO YOU MANAGE THE CONTACT LOAD?

A: Redundancy and preparation are central to our resilience strategy. With teams across multiple locations, we can shift workload in response to regional disruptions, for example, redistributing contacts between Florida and Atlanta during severe weather events.

We have established downtime procedures that allow agents to continue supporting customers even during system interruptions, including capturing information and following up as needed.

Agents also have access to nearby offices for in-person tech support if required for equipment issues or home internet disruptions: one of the reasons we hire within a close radius of our offices.

In addition, we maintain formal disaster recovery plans to ensure continuity during larger-scale disruptions. While we rarely need to activate these plans, being prepared allows us to continue delivering reliable service to our customers when they need it most.

Q WHAT ARE THE NEXT STEPS FOR GAS SOUTH?

A: Our focus is expanding our customer base while deepening our impact in the communities we serve.

HANDLING SUDDEN PRICE HIKES

Energy suppliers, like natural gas companies, sometimes face sudden price hikes that occur mostly for reasons beyond their control. Events that understandably cause customer contacts to spike.

So, we asked Jenni Hawkins, Gas South how her company informs customers of these matters, and, equally critically, trains its agents how to respond to customers when they reach out to them.

"While natural gas prices can fluctuate due to market conditions, our customer care team works closely with customers to understand their needs, explain their plan options, and recommend solutions that can help minimize the impact of market volatility," says Jenni.

"For example, many customers choose fixed-rate plans that lock in the rate-per-therm for the duration of their contracts, although the monthly bill varies based on usage, taxes, Atlanta Gas Light charges, and applicable fees.

"Others benefit from our OnePrice Plan, which allows them to pay the same amount every month, plus taxes, for a flat-rate gas bill.

"When customers do reach out with concerns, our agents are trained to lead with empathy, provide clear information, and help customers identify the solutions that best fit their situation."

As we grow, so does our ability to give back. Our commitment to contributing 5% of profits to support children in need remains a core part of our purpose.

We also continue to innovate in the CX space. Like many organizations, we are thoughtfully exploring the role of emerging technologies. We see AI as an enabler – not a replacement – for our people.

Our approach is to use technology to eliminate manual tasks, improve efficiency, and empower our team members so they can focus on building meaningful connections with our customers who drive long-term loyalty.

Q WHAT ARE YOUR RECOMMENDATIONS FOR CONTACT CENTERS FACING SIMILAR CHALLENGES, ISSUES, AND OPPORTUNITIES?

A: To summarize our approach, it comes down to a few key principles:

1. Hire for empathy and mindset, not just technical skill.
2. Build culture intentionally.
3. Coach to behaviors, not just metrics.



4. Invest in career development and growth opportunities.
5. Ensure leaders model servant leadership and organizational values, and most importantly, listen to your frontline team. They are closest to your customers and see pain points and opportunities more clearly than any dashboard ever will. [D](#)



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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EXECUTIVE INTERVIEW

BY LINDA HARDEN, CONTACT CENTER PIPELINE



ILLUSTRATION PROVIDED BY ADOBE IMAGES

EXECUTIVE INTERVIEW WITH NITESH KUMAR SPONSORED BY FLATWORLD SOLUTIONS.



NITESH KUMAR
VICE PRESIDENT, FLATWORLD SOLUTIONS

Nitesh Kumar is Vice President at Flatworld Solutions, where he leads the Contact Center and Healthcare verticals, along with the company's AI product line. He brings extensive experience in the outsourcing and offshoring industry, with expertise in sales, customer relationship management, team building, and operational management.

I had the pleasure of speaking remotely with Nitesh Kumar of Flatworld Solutions. I was excited to have this conversation because I'm intrigued by how organizations are integrating AI and its capabilities into their current processes and technologies, as well as how AI affects people and improves the experiences of agents and customers. That's what drives Nitesh: finding ways to make AI work within existing environments. Please enjoy our conversation.

Q NITESH, FLATWORLD SOLUTIONS HAS AN AMAZING STORY TO SHARE. PLEASE INTRODUCE YOURSELF, YOUR ORGANIZATION, AND WHAT YOU DO.

A: I'm Nitesh Kumar, Vice President at Flatworld Solutions, where I lead our Contact Center and Healthcare verticals, along with our AI product line. My work sits at the intersection of two things I care about: building technology that genuinely changes how an operation runs, and making sure the people behind that technology are set up to do their best work, not replaced by it. Flatworld Solutions has spent over two decades helping organizations run leaner, smarter customer operations, and today that mission looks like pairing a large global delivery footprint with AI tools we design and build ourselves, rather than license off a shelf.



Q PLEASE SHARE WITH US ANY "STATS" ABOUT YOUR ORGANIZATION. WE WOULD LOVE TO KNOW A LITTLE ABOUT YOU. HOW ARE YOU STRUCTURED? WHERE ARE YOU LOCATED? TYPES OF BUSINESSES YOU WORK WITH IN THE CONTACT CENTER SPACE? HOW MANY CENTERS/AGENTS? TYPES OF COMMUNICATIONS AND HOW MANY HANDLED?

A: Flatworld Solutions runs a global delivery network of 5,000+ agents across 10+ delivery centers, with multiple locations in India, two sites in the Philippines, and additional centers in Bolivia, Colombia, and Vietnam. That footprint gives us real follow-the-sun coverage and genuine language diversity — English, Spanish, Tagalog and Vietnamese-language support operating side by side under one delivery model, not as bolted-on regional add-ons.

On the industry side, we support clients across most of the verticals that depend most heavily on contact center excellence: healthcare, e-commerce and retail, insurance, mortgage and financial services, banking, travel and hospitality, telecom, technology/SaaS, utilities, and logistics. Across voice, chat, email, and social channels, our teams handle well over 200 million customer interactions a year — and that number keeps climbing as clients shift more complex, judgment-heavy work to us rather than just overflow volume.

"THE BIGGEST LESSON WE'VE LEARNED IS THAT AI SUCCEEDS IN A CONTACT CENTER WHEN IT'S WOVEN INTO THE WORKFLOW AGENTS ALREADY USE..."

-- NITESH KUMAR

Q YOUR MISSION IS TO USE TECHNOLOGY TO DRIVE BUSINESS EFFICIENCY AND GROWTH. WHAT TECHNOLOGIES DO YOU INCORPORATE AND HOW DO THEY DRIVE EFFICIENCY AND GROWTH?

A: The technologies driving our growth fall into three buckets: automation, intelligence, and governance. On automation, we use AI-driven routing, RPA, and self-service to take repetitive volume off live queues before it ever reaches an agent. On intelligence, our proprietary agent-assist tools surface the right answer, the right script, and the right next action in real time, mid-conversation, not after the fact. And on governance, our in-house quality monitoring platform analyzes 100% of interactions instead of the industry-standard 2-5% sample, using sentiment and compliance scoring to catch issues as they happen rather than in a post-mortem review weeks later.

That shift — from sampling to full-coverage monitoring — is, in my view, one of the most underrated AI unlocks in this industry. It turns quality from a backward-looking audit function into a real-time coaching and risk-management tool, and that is where efficiency and growth actually compound.

Q PLEASE TALK WITH US ABOUT HOW YOU SEE INTEGRATING AI INTO CUSTOMER SERVICE CENTERS.

A: The biggest lesson we've learned is that AI succeeds in a contact center when it's woven into the workflow agents already use, not bolted on as a separate tool they have to context-switch into. We've built this out most deeply in regulated, high-stakes environments like healthcare and insurance, where an agent-assist tool doesn't just need to answer faster, it has to get the compliance language exactly right every time. That same architecture — agent assist, automated quality monitoring, error tracking, and a unified reporting layer — translates directly into e-commerce, mortgage, and other verticals where speed and accuracy both carry real financial consequences.

Done well, AI in the contact center isn't a chatbot bolted onto a website. It's a layer that sits underneath every interaction, guiding the agent, scoring the conversation, and flagging risk, so that the channel a customer happens to be in becomes almost irrelevant to the quality of experience they get.

Q WHAT DO YOU SEE AS THE BIGGEST AI CHALLENGES, BEYOND THE TECH ITSELF?

A: Honestly, the technology is the easy part now — the models and tools have matured faster than most organizations' ability to absorb them. The real challenges are structural and human, and I'll be candid about where I think our industry is getting it wrong.

First, there's a change-management gap. A lot of companies are bolting AI onto existing processes instead of re-designing the process around what AI actually makes possible, and they end up with incremental efficiency gains instead of real transformation — then wonder why the ROI never shows up on the balance sheet.

Second, there's a trust deficit on both sides of the interaction. Agents are anxious about being replaced rather than augmented, and that anxiety quietly undermines adoption: if your frontline doesn't trust the tool, they will work around it. Customers, meanwhile, are increasingly wary of AI-driven service that feels scripted or evasive, especially in sensitive categories like healthcare and financial services, where one bad automated experience can do lasting brand damage.



Third — and this is the one I think gets underestimated the most — is governance and data quality. Everyone wants AI-driven insight, but very few organizations have the clean, structured, compliant data pipelines to make those insights reliable. Globally, we're seeing a wave of companies that bought the AI tool before they fixed the data and process foundation underneath it. That sequencing problem is going to show up as a wave of stalled or quietly abandoned AI initiatives over the next couple of years — not because the technology failed, but because the groundwork was never there.

Q DO YOU THINK AI IS SERVING TO IMPROVE ACCESSIBILITY AND EFFICIENCY? DO WE STILL HAVE MORE WORK TO DO TO MAKE THIS AN OPERATIONAL SUCCESS?

A: Without question, yes — AI has made customer service meaningfully more accessible. Real-time translation and transcription are breaking down language barriers, voice-to-text and sentiment tools are helping agents better support customers with hearing or speech differences, and intelligent routing means customers reach the right resource faster instead of being bounced between queues.

But accessibility and efficiency gains aren't automatically distributed evenly, and that's where the industry still has real work to do. A lot of AI deployments are optimized for the median customer and the median interaction, and they can quietly make things harder for customers with complex needs, non-standard accents, or several overlapping issues in one call — exactly the customers who need the most help, not the least. Getting this right takes deliberate design and continuous human oversight; it doesn't happen automatically just because a model gets deployed.



Q AS BUSINESSES LOOK TO COMBINE OUTSOURCING WITH AI, WHAT DOES IT TAKE TO MOVE BEYOND SIMPLY AUTOMATING TASKS AND ACTUALLY REDESIGN CONTACT CENTER OPERATIONS FOR GREATER EFFICIENCY, QUALITY, AND GROWTH?

A: Combining outsourcing with AI only pays off when you treat it as an operating-model redesign, not a cost-reduction project. Too many organizations approach this as “automate what already exists” — take the current workflow, the current org chart, the current KPIs, and bolt AI onto the edges. That gets you a 10-15% efficiency bump at best, and it's the ceiling most transformation initiatives are quietly hitting right now.

The real gains come from asking a harder question: if we were designing this operation today, with AI-native tooling, what would the structure, staffing model, and quality framework actually look like? In our own operations, we've found that consolidating specialized teams into fewer, larger hubs — rather than spreading thin generalist teams across many small sites — produces measurably better outcomes: faster escalation handling, tighter knowledge-sharing, sharper quality calibration. That's the same principle AI-era contact centers need to apply to themselves. Don't automate the old structure — redesign the structure around what AI and skilled people can now do together.

“...I DON'T THINK THE WINNING MODEL IS “AI VERSUS AGENTS.” IT'S AI HANDLING VOLUME AND CONSISTENCY, AND AGENTS HANDLING JUDGMENT AND TRUST...”

Q AS AI BECOMES MORE EMBEDDED IN CONTACT CENTER OPERATIONS, HOW DO YOU SEE THE ROLE OF PEOPLE EVOLVING, AND WHAT BALANCE BETWEEN AI AND HUMAN EXPERTISE DO YOU BELIEVE BUSINESSES NEED TO ACHIEVE THE BEST CUSTOMER OUTCOMES?

A: I don't see this as AI replacing agents — I see it as AI absorbing the parts of the job that never needed a human in the first place: looking up information, filling out forms, summarizing a call, scoring a transcript against a QA checklist. That frees agents to spend their time on what people are still demonstrably better at: reading emotional nuance, de-escalating a frustrated customer, and handling the genuinely novel problem that doesn't fit a script.

Businesses getting this balance right are investing as much in upskilling their agents as they are in the AI itself, turning agents into higher-judgment problem-solvers supported by AI, rather than treating AI as a slow-motion replacement plan. Long-term, I don't think the winning model is “AI versus agents.” It's AI handling volume and consistency, and agents handling judgment and trust — and the moment either side creeps too far into the other's territory, the customer experience is the first thing to suffer.



Linda Harden is President and Founder of Pipeline Publishing Group and Contact Center Pipeline magazine.



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TURNING QA DATA INTO INSIGHTS

HOW THEY CAN HELP CONTACT CENTERS.

Performance doesn't improve by accident. It improves when organizations take a disciplined approach to measuring real behaviors in interactions and use those insights to understand trends that drive coaching, training, and change.

Tracking individual call evaluations by memory—or by pen and paper—quickly becomes overwhelming, especially when quality assurance (QA) analysts are responsible for weekly or monthly quotas across 30, 40, or even 50 agents.

With most agents receiving six to eight evaluations per month, that workload adds up fast: a 40-agent team can easily generate nearly 300 QA reviews in a single month.

One call doesn't tell the story. Multiple evaluations reveal patterns: separating occasional mistakes from consistent behaviors and creating targeted coaching opportunities, such as improving call control to reduce average handle time (AHT) (also see my three-part series on AHT in the [May](#), [June](#), and [July](#) issues).

When analysts are moving from call to call and score to score at that volume, it becomes difficult to see patterns over time. Like:

- "Why was Susie marked down for call authentication this week and was it the same issue she missed last time?"

- "Why did Pat fail two evaluations for reasons that seem unrelated on the surface?"

Without structure, those answers get lost while QA data stays fragmented and becomes guesswork. And fragmented data rarely leads to meaningful improvements: if any at all.

As one principle has consistently proven true in call centers: *QA data doesn't fail organization. What fails is treating it as a scorecard instead of a signal.*



JUST AS IMPORTANT: DON'T ONLY TRACK WHAT WENT WRONG. TRACK WHAT WENT RIGHT.

This is where turning QA activity into insight—rather than just scores—makes all the difference. It brings the QA process full circle; my [April article on QA](#) focused on seeing it through the agents' eyes while in the December issue I will look at integrating QA with training. I will also discuss training here as well.

START WITH A SIMPLE, STRUCTURED TRACKING SYSTEM

About 10 years ago, when I worked as a team lead, I was responsible for completing weekly QA evaluations for my team of 12 to 16 agents. Like many new leaders, I approached QA the same way everyone else did at the time: complete the required quota and move on to the next task.

Each agent received three evaluations per week: a short call (one to two minutes), a medium call (three to four minutes), and a long call (anything over four minutes). I took detailed notes, explained deductions to agents, and even gave some agents second chances when warranted.

On the surface, it felt thorough, at least to me at the time. But over time, I realized something was missing.

I couldn't easily answer basic questions, such as:

- Which agents were repeating the same mistakes?
- How often was I overlooking an issue versus coaching it or placing the agent on corrective action for repeat offenders?
- Were the specific problems isolated? Or were they showing up across the team?

Once the week ended, the insights disappeared with it. You know that feeling when the whistle blows, you slide down the dinosaur's tail, as in the old "Flintstones" cartoon, ready to clock out.

That's when I built a simple tracking system: nothing fancy, just an Excel spreadsheet. (Google Sheets works just as well, especially for smaller centers or teams without the budget for a dedicated QA platform.)

Here's what I tracked:

- Category of markdown (e.g., Call Authentication, Empathy, Long Hold Without Check-Back).
- Specific reason for the issues (for example: "Agent failed to verify member's date of birth").
Be specific; two months later you won't remember what the deduction was really about.
- Call details (channel, date and time, call type [such as an inbound member's call in Spanish]).
- Agents' names and call length.
- CSAT scores or other relevant performance indicators, when available.
- Agent scores, color coding those that passed versus those that failed.

That simple structure changed everything. Suddenly, QA stopped being a series of disconnected evaluations and became a source of insight.

WHAT THE DATA REVEALS

If you have a sufficient budget for tracking QAs—but not enterprise-level spend—you can take this a step further. Use SharePoint as a data repository and Power BI for analytics, creating dashboards that reveal trends over time.

If tools like Copilot are available, they can accelerate analysis by surfacing patterns such as: "Agent Terry has failed five QA evaluations in the past 10 months due to improper call disconnects."

That's not just data. That's a signal to investigate call histories and provide targeted coaching before the behaviors escalate or send you down a rabbit hole looking for other instances of inappropriately disconnected calls.

WHY TRACKING WHAT GOES RIGHT MATTERS

Just as important: don't only track what went wrong. *Track what went right.*

Capturing 100% QA scores helps define what "good" actually sounds like. High-performing calls can serve as learning examples, be included in training, or even be leveraged to identify potential mentors for new hires.

Recognition, when grounded in data, becomes meaningful rather than subjective. What gets recognized gets repeated.



When I joined as a call center supervisor and trainer in my new role, I was asked to help with QA and I brought back my old tracking system. I began noticing that agents handling payment-related calls performed well on straightforward questions:

- "How much do I owe?"
- "When is my payment due?"

But when callers asked more complex questions — such as why their monthly payments fluctuated — performance dropped sharply. Agents redirected callers unnecessarily, guessed at explanations, or provided vague responses that created confusion rather than clarity.

As you can imagine, callers were calling back, which led to a drop in first call resolution (FCR), higher AHT, and, you guessed it, a reduction in CSAT; it's a domino effect most of us reading this don't like. *QA data made the knowledge gap that had developed impossible to ignore.*

We addressed the gap through targeted microlearning and updated knowledge articles in our knowledge management system (KMS).

For new hires, we revised instructor-led training (ILT) to explain the most common reasons premiums change clearly. We also added knowledge checks to ensure agents retained the material.

In reality, the explanations were straightforward:

- Changes in household income.
- Partial or missed premium payments or excess payments in prior months.

But without proper training, agents were improvising and the callers paid the price.

After rolling out the updated training, QA monitoring showed steady improvement. A few agents needed one-on-one coaching, but before long, the entire center was delivering consistent and accurate explanations.

The difference was night and day.

QA tracking didn't just improve scores; it aligned behavior, strengthened confidence, and ensured customers received clear and correct information on each call.

And that's the *real* value of structured QA tracking: not compliance for compliance's sake, but for clarity, consistency, and confidence across the floor.

USING QA DATA TO SPOT RISKS

Once QA data is consistently captured and structured, the next step is turning it into something your leadership team can act on.

Visual charts and dashboards, whether in Excel, Power BI, AI, or another analytics tool, help surface patterns that are easy to miss when reviewing individual scorecards in isolation.

In my experience, one of the most valuable uses of this data is identifying agents who may be approaching burnout.

QA scores often provide the first signal. These are agents who consistently hover at "meets standards," fluctuate between passing and failing, or continue to miss expectations despite coaching or corrective action. While QA alone doesn't diagnose burnout, it can raise a vital flag that warrants closer attention.

To understand the whole picture, QA data should be reviewed alongside other operational indicators, including:

- AHT
- Schedule adherence
- CSAT
- Transfer and escalation rates.
- The ratio of calls documented to calls handled.

When several of these metrics begin to trend downward together — or show sustained inconsistency — it may indicate fatigue, disengagement, or cognitive overload, rather than a skills issue.

At that point, the most crucial step isn't another scorecard: it's a *conversation*. When leaders have built rapport, agents are often willing to share what's really happening.

Sometimes the solution is operational: moving an agent from voice to chat or email, rotating them to a different call type, or giving them time off the phones to support new hires or assist with quality initiatives. These changes can help restore purpose and reduce emotional strain without sacrificing performance.

In other cases, the challenge may be personal rather than work-related. While managers don't need to solve those problems, they can help by partnering with Human Resources (HR) to explore options such as flexible scheduling, shift changes, or temporary accommodations.



Many of these situations are short-term, and thoughtful support can make the difference between losing a strong performer and helping them regain their footing.

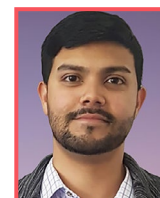
Used this way, QA data becomes more than a compliance tool: it becomes an early warning system and a bridge to meaningful engagement.

And when QA is treated as a living system — not a static scorecard or an item on a checklist — it becomes one of the most potent tools a contact or call center has.

Structured tracking turns volume into visibility. Visibility turns patterns into insight. And insight, when paired with thoughtful training and leadership, turns everyday interactions into consistent, confident customer experiences (CXs).

When QA insights reduce repeat calls, rework, and agent frustration, the pay-off goes far beyond quality metrics. Handle times come down, retention improves, retraining decreases, and leaders gain clearer insights into where automation or AI can help agents succeed.

The real value of QA isn't found, then, in the scores themselves. *Instead, it's found in what organizations choose to do with the story behind it.* 🗣️



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.

WHEN LEADERS HAVE BUILT RAPPORT, AGENTS ARE OFTEN WILLING TO SHARE WHAT'S REALLY HAPPENING.



ILLUSTRATION PROVIDED BY ADOBE STOCK

ENHANCING THE VOC PROCESS

SECOND, TURNING VOC INSIGHTS INTO ACTION.

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.

Part 1 of this two-part article, based on our 2026 survey conducted by Customer Care Measurement & Consulting (CCMC) with Contact Center Pipeline, addressed the foundational architecture of a strong VOC process: governance, unified data collection, and AI-enabled analysis.

This second article focuses on what leading organizations do after the analysis is complete: how they report VOC insight, assign ownership, execute action plans, track results, and address the blind spots that still limit impact.

REPORTING THAT DRIVES DECISIONS, NOT JUST DASHBOARDS

Reporting now goes far beyond data tables to visualization, prioritization, recommendations for action, and accountability.

1 Lisa Oswald, Global Head of Member Services, Travelzoo described the

use of “a living chart of issues across the customer journey by type of product,” which continues from one reporting period to the next, keeping all issues in view while conveying shifts in intensity and progress toward resolution.

2 Leaders assign each VOC issue to an individual manager who is responsible for enlisting support from other functional areas. The report often suggests which function is best positioned to take the lead in mitigation or resolution.

3 The most successful VOC analysis groups suggest outcome targets (mitigation or elimination of the issues) and process metrics that can be tracked weekly or monthly.

4 Quality and process improvement often provide rapid-prototyping expertise in the pilot testing of concepts prior to full implementation. This reduces the risk of acting on an issue identified by the VOC process.

5 At Nestlé Purina and Travelzoo, revenue-based business cases are produced for each issue, as well as for clusters of issues that imply strategic initiatives and product or service innovations.

6 Extrapolating the number of complaints to the number of customers affected—and then estimating the revenue impact of a month of inaction—is a powerful way to precipitate commitment.

The multiplier factor is usually 8–20X cost impact and is estimated via a survey of a random sample of customers to determine both problem prevalence and complaint behavior.

For example, multipliers of between eight and 15 problems for each complaint voiced were found in a survey of 8,000 consumers by major consumer product goods (CPG) companies in 2024.

7 Leading programs actively encourage frontline staff to submit both emerging issues and new ideas.

Feedback on the impact of prior input is critical to sustaining participation by showing employees that they are being heard and their ideas are, at least sometimes, being implemented.

One company's VOC activity was recently recognized for submitting the winning "next best marketing idea" for innovative marketing. Top management has allocated significant funds to pilot test the concept, which is currently under development.

In another company, this front-line-input process has been termed "the wacky ideas report," which was avidly read by Product Management.

Product managers valued the report because it surfaced aspects of product design that had not been considered, but based on contact center input, turned out to be competitive advantages.

Starbucks, HP, and Lego (not companies that participated in this study) have used similar input and recognition mechanisms for both employees and customers to identify new opportunities for products and marketing.

8 Separate, relatively unfiltered reports of ideas and suggestions for process improvements are encouraged from both customers and staff members.

For example, one auto manufacturer supported this input process via a simple email channel to the service center's root-cause analyst, where CSRs could submit case numbers, along with comments or suggestions.

FEEDBACK ON THE IMPACT OF PRIOR INPUT IS CRITICAL TO SUSTAINING PARTICIPATION BY SHOWING EMPLOYEES THAT THEY ARE BEING HEARD...

9 Michelin, Nestlé Purina, and Travelzoo all use storytelling and customer quotes to humanize the data and show the emotional impact of issues. At Michelin, wave files of phone calls are played on the plant floor for operating staff to underscore the importance of the issue.

10 Quantified estimates of the impact of word of mouth/mouse (WOM/M) are now gaining far more traction with Marketing and Product Management as a positive output of the customer experience (CX) and the service experience.

CMOS' THREE BAD ASSUMPTIONS

The role of the chief marketing officer (CMO) can be undermined by their failure to attend to a few basic norms of organizational management. This is where CX and service executives can help by reminding their CMOs of the following three bad assumptions.

1. No news is good news

The problems you *don't* hear do the most damage.

2. Transparency is the kiss of death: customers don't want to know about limitations

Transparency is a delighter. Warning customers keeps them out of trouble and avoids problems.

For example, one insurance company's welcome letter generated *more* revenue because it highlighted what was not covered, providing vital information that the customers actually wanted to know about, leading to them buying riders for more insurance on the uninsured areas.

3. Soliciting complaints and questions is dumb and expensive

Complaint rates are a function of visibility, message, and customers' skills with the products.

ACTION PLANNING, ACCOUNTABILITY, AND AGGRESSIVE COMMUNICATION

Part 1 established that strong analysis is necessary but not sufficient. The next requirement is disciplined execution.

Once issues and priorities are formalized, a manager is assigned to each point of pain (POP) or issue and given the authority to coordinate across functions. That person then convenes an action-planning group to determine next steps.

Responsibility for each POP should be assigned to a specific manager, even if the issue is cross-functional. The assigned manager is then responsible for gaining cross-functional cooperation with implicit approval from senior management. (This approach is described in *The Amazon Way*, written by John Rossman.)

Quality or continuous improvement often takes the lead in rapid prototyping of solutions to be tested, with the VOC/ Insights department assisting in developing both process and outcome measures.

Each action plan aimed at a particular POP should have process metrics, outcome metrics, and ownership by a single executive responsible for implementation.

The benefit of action plans associated with specific POPs is that their occurrence and complaints can be easily counted, making progress or lack of progress explicit. Results are much harder to fudge.

Communication by executives to internal and external audiences, both formally at multiple levels and informally through Town Halls, and in a manner that elicits their interest and absorption of the material, is critical.

When issue actions are communicated in those forums, everyone knows management supports the effort, and management has publicly committed to addressing the issue.

Almost all leading companies use storytelling as a mechanism to humanize the data for internal audiences such as product, plant, and operations employees, like contact center agents and supervisors, as well as back-office and IT staff.

TRACKING RESULTS AND ALIGNING INCENTIVES

Once action plans are executed, each issue or global strategy should have quarterly or monthly tracking of process metrics.

Executives should be kept apprised of each initiative and there should be frequent involvement, recognition, and feedback to frontline employees and selected customers.

A global scorecard of issues raised by the VOC process versus issues mitigated or completely resolved is the ultimate tracking mechanism.

SIX COMMON BLIND SPOTS THAT QUIETLY UNDERMINE VOC ROI

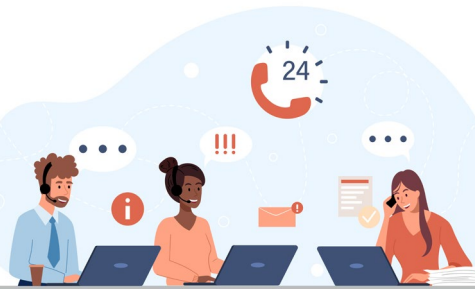
Even among strong performers, several weaknesses, in the absence of key parameters and practices, continue to limit VOC impact:

1. Knowledge of the percentage of customers acquired via positive WOM/M

Without this parameter, it is hard to prove that great service and delight are truly delivering a robust payoff.

2. A global issue classification scheme across all parts of the company

Without a consistent classification scheme, problem data are diluted, fragmented, or "lost," leading to weaker business cases.



3. A simple channel—such as an email box—for frontline employees to report preventable issues to a root-cause analyst, with monthly feedback on what was done

Without such a channel, CSRs simply fix each problem and move on without flagging emerging or perennial issues missed by the VOC or quality management (QM) processes.

4. An agreed-upon long-term value of a loyal customer

Without this parameter, it is hard to develop an accepted business case for the revenue impact of problems and customer delight.



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5. Asking quality, operations, and product managers how they use VOC reports

If the VOC "customers" are never asked whether they are getting value—including recent examples of impact—the VOC process will continue producing unactionable output.

VOC report recipients should be asked, "What did you do with the last VOC report I sent you?" Answers may include "scanned it," "read it but took no action," or "took action on at least one item," ideally with a specific example of action and impact.

You may be depressed by the responses, but at least then you know and can make improvements. *If you don't ask, your VOC impact may be wishful thinking.* For when action is taken, those stories provide strong support for investment in VOC. But if no action is taken, barriers can be identified and mitigated.

6. Not overtly asking, at least yearly, "How many of the issues identified by the VOC process have been fixed and what has been the revenue contribution of preventing those issues?"

If there is no attempt to quantify the issues affected by VOC, much of the effort and resources invested may be wasted.

FIVE LOW-COST MOVES TO ENHANCE VOC IMPACT

- Quantify the number of customers affected by an issue, scaling up by using a multiplier; use 10:1 as a conservative estimate if real data is not available.
- Educate senior executives on the tip-of-the-iceberg multiplier, WOM/M customer acquisition, and the amplified impact of transparency and problem prevention.
- Provide a simple channel for employees to report weird or preventable contacts and to contribute marketing and product development ideas from the front line.

YOU MAY BE DEPRESSED BY THE RESPONSES, BUT AT LEAST THEN YOU KNOW AND CAN MAKE IMPROVEMENTS.

- Focus on issues shared by customers and frontline employees.
- Introduce WOM/M into impact calculations to include social posts and reviews. Point out to product managers that the most successful companies have high levels of customer conquest from WOM/M referrals.

MAKING THE STRATEGIC CASE FOR VOC

Investment in an enhanced VOC process provides, on average, roughly 15 times the ROI of equivalent investment in frontline service and CX activities.



QUANTIFY THE NUMBER OF CUSTOMERS AFFECTED BY AN ISSUE, SCALING UP BY USING A MULTIPLIER...

The first step in demonstrating this payoff is to ask, "What is being done with the existing VOC, and how can its impact be measured?"

A second step is to create a global estimate of the number of customers encountering some type of problem and multiply that number by a conservative revenue value per customer.

Finally, engage Product Management and Marketing on the idea of using VOC to enhance WOM/M, pointing out that the cheapest effective marketing is, as Mike Jannini, former President of The Cheesecake Factory, said, "Letting your customers do your marketing for you!"

IN CLOSING

This second article is designed to stand on its own, but it is best read as the companion to [Part 1](#), which explains the foundational architecture of high-impact VOC: executive ownership, unified data collection, and AI-enabled analysis.

Together, Part 1 and Part 2 provide a complete framework for redesigning VOC as a strategic growth and improvement engine. 📌



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.

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DEFLECTION IS *NOT* RESOLUTION

THE MOST TRUSTED METRIC HIDES EXPENSIVE FAILURES.

Here's the scenario:

- A customer emails about a billing charge.
- She explains the problem, attaches a screenshot, and gets a reply telling her it has been escalated.
- The ticket closes.
- A week later the charge is still there, so the customer opens a new ticket, re-explains everything, and re-attaches the same screenshot to a different agent, *who has no idea the first conversation ever happened.*
- Nothing the customer did the first time carried forward, so she started over from zero.

I spent 15 years on the operations side before I moved into this seat and found that pattern is common across industries. What *is* new is how fast enterprises are scaling their use of AI and the un-addressed challenges associated with it.

Gartner found that 91% of customer service leaders reported executive pressure to deploy AI in 2026. That pressure creates demand for a metric that proves quick ROI.



**DEFLECTION IS...MEASURING THE
WRONG THING...IT SAYS NOTHING
ABOUT WHETHER THE
CUSTOMER'S ISSUE GOT SOLVED...**

Deflection is the one that leaders reach for because it visibly shows the AI handling volume. *But it's measuring the wrong thing.*

THE DEFLECTION TRAP

Deflection counts interactions that are handled by automation. But it says nothing about whether the customer's issue got solved, like in the all-too-common scenario I outlined.

Within that gap lies the damage. Gartner [research](#) (easel AI) puts AI deflection above 45% of incoming queries, while only about 14% of deflected queries reach full self-service resolution.

That is a huge 31-point gap: interactions that were touched by automation, marked as handled, *and left unresolved*. Every one of them is a customer who is about to come back. But almost nobody is tracking that rate of return, and it's expensive.

WHAT STARTING OVER COSTS

Our [analysis](#) of 33.4 million customer conversations across more than 50 organizations, published this year, put a number on it.

In a comparison between customers whose issues were handled in a single contact, and customers who had to open new interactions about the same problems, the ones forced to start over scored 11.2% lower on satisfaction.

The penalty held across every channel. And it got worse depending on where the customer had to re-engage.

Email was the worst on both counts. One in five email conversations produced a repeat contact, and those repeats lost 17.7% in satisfaction, the steepest drop of *any* channel.

In email, a repeat is not more back-and-forth on an open thread. It means the prior thread failed completely, so the customer had to reopen a new one, retype the issue, and re-attach the documentation.

When the first email did not resolve the issue, customers came back at 2.3 times the rate. Email also happens to be the channel absorbing the most AI-generated responses right now. If automation is closing tickets without confirming resolution, this is where it costs you first.

THE REPEAT CONTACT STILL HAPPENS; IT JUST LANDS IN ANOTHER CHANNEL'S NUMBERS OR IT DISAPPEARS ENTIRELY BECAUSE THEY QUIT.

THE FAILURES THAT LOOK FINE

Here is the finding that should change how you run quality assurance (QA): the biggest satisfaction hit didn't come from tense, obviously bad conversations; instead, it came from the ones that looked fine.

We found that in interactions with normal sentiment, the repeat-contact penalty was *roughly seven times larger* than in conversations that were already negative.

It comes down to the expectations:

- A customer who was already frustrated has (subconsciously) priced in the friction, so a callback just confirms what they expected.
- A customer whose first interaction left them feeling like the issue had been addressed had no reason to expect a second round.

So, when the problem resurfaces and they have to start from scratch, the gap between what they expected and what they got is at its widest.

Think about what that means for a program built on sampled reviews. A closed ticket with a professional tone, but with an unresolved outcome, sails through QA. So, while it may look like a good interaction, it ends up being your most expensive one.

Sampled QA is structurally blind to this because the failure is invisible inside any single transcript. You only see it when you connect the first contact to the second.

WHY YOUR CLEANEST CHANNELS LIE

Chat posted the lowest repeat rate in the study, roughly half of email's, despite having the lowest first contact resolution (FCR) rate of any channel measured.

Logic would say that a channel that resolves the fewest issues on the first try should generate the most follow-up, but chat generated the fewest.

THE METRIC THAT MATTERS MOST

The industry is spending more on AI-driven deflection than at any point in its history, and the number most vendors lead with keeps climbing.

But the most important data tells you how many customers had to come back and say it twice. Fix resolution and context together and that number falls.

If you celebrate deflection without measuring repeat contact, you are optimizing for a metric that hides your most expensive failures.

The likeliest explanation is *channel exit*. A customer who does not get resolved in chat rarely comes back through it. They call, email, or give up. The repeat contact still happens; it just lands in another channel's numbers or it disappears entirely because they quit. Either way, it never shows up in chat's stats.

The channel that looks cleanest can be the one pushing its failures somewhere else. So, if you evaluate channels in *isolation*, you will reward the one that is best at hiding the problem.

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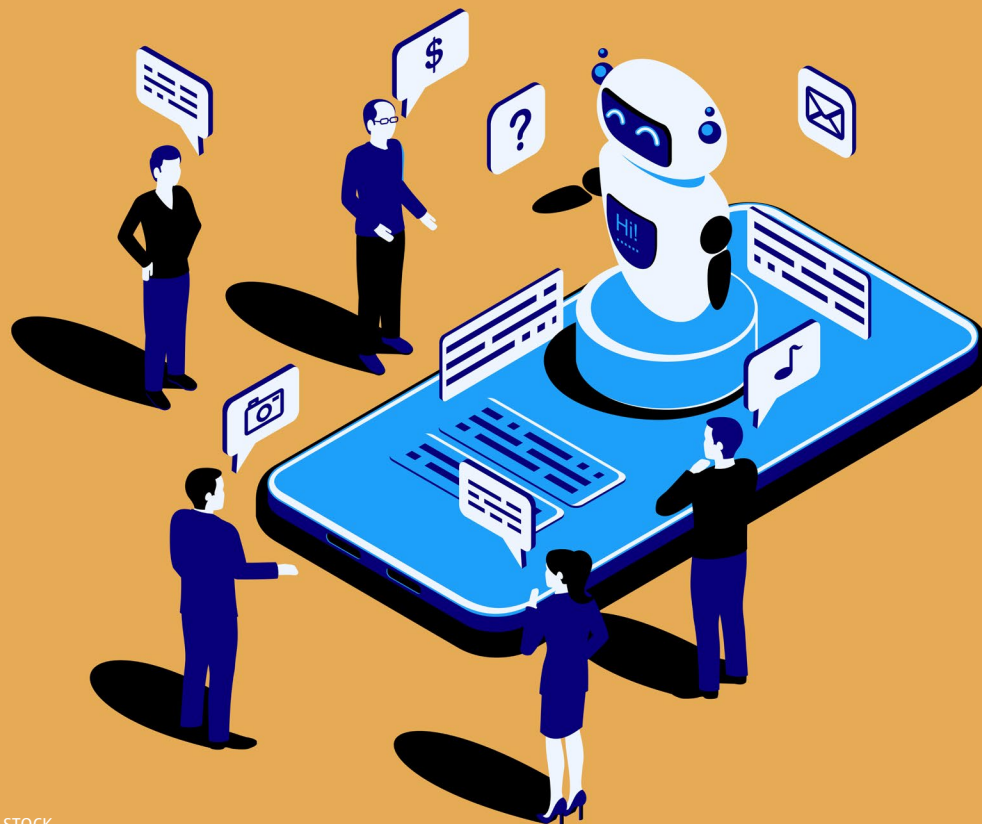


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HOW CONVERSATIONAL AI IS REWIRING CONTACT CENTERS

THEY CAN BECOME (*FINALLY!*) REVENUE, NOT COST, CENTERS.

Over the past 60 years, contact centers have evolved far beyond their analog origins of room-sized switchboards and crowded bullpens of elbow-to-elbow operators.

Today, these sophisticated digital hubs serve as brands' customer nerve centers, providing service and support while orchestrating holistic, deeply personalized experiences.

Now, conversational AI is driving the next generational step change in how customers interface with brands, shifting contact centers from passive inbound cost centers into proactive outbound engines of revenue generation.

But this transition doesn't come without its challenges. Enterprises can struggle to connect models with live communication channels, like real-time voice,

or provide agents with unified data and context, forcing their customers to start from scratch and repeat themselves with every interaction.

This can be compounded by the inability for businesses to intervene during live interactions, where insights about negative sentiment or churn risk are surfaced afterward. And often too late for deal-saving interventions or agent support while customers are still engaged.

In a future of high automation and high augmentation, how can companies mature their conversational AI strategies—from frontline technology to backend culture—to reduce friction, enhance collaboration, and empower more intelligent, intuitive customer journeys?

**...HOW CAN COMPANIES
MATURE THEIR CONVERSATIONAL
AI STRATEGIES...?**

PILOT TO PRODUCTION, MONEY SAVER TO MONEY MAKER

This time last year, most contact centers were still tinkering at the edges of conversational AI, running slow, small-scale pilots of a few thousand calls to gauge customer reaction and operational efficiency.

But 12 months later, tinkering has turned tactical as enterprises and independent software vendors (ISVs) have pivoted from proofs of concept to production at scale, ingesting hundreds of thousands of minutes into their models.

In other words, we're crossing a genuine conversational chasm.

This acceleration is happening across industries with historically heavy contact center volumes—healthcare, hospitality, retail, financial services—bending the curve from pilot to production, particularly in voice AI.

Targeting low-risk, low-touch use cases at the bottom of the complexity pyramid such as billing questions, balance checks, and password resets, some brands are now offsetting the majority of their inbound.

Take Chime, a financial technology company that now delegates a staggering 70% of customer support inbound chats and calls to AI agents.

According to Vineet Mehra, Chief Growth and Marketing Officer, automating simple, low-empathy use cases has reduced the company's costs by 60%, boosted Net Promoter Scores, and become what he says is an unbelievable driver of customer satisfaction.

"So [this is] an example of cheaper and better at the same time really re-inventing a workflow that we used to have," Vineet recently shared on the Marketing Beyond Podcast.

This is catalyzing a seismic shift. Contact centers are shedding their legacy identity as reactive cost centers and emerging as proactive growth drivers. One where conversational AI isn't merely a deflection tool but is now a powerful engagement system.

In this new environment, intelligent agents, armed with deep contextual data, can flag issues and fix account discrepancies *before* customers ever pick up the phone or enter the chat. While also uncovering new revenue streams through tailored product or service suggestions.

NOT OUT OF THE UNCANNY VALLEY YET

For all this momentum, there remains a delicate interplay between proprietary data, technology performance, and customer perception, any one of which can throw a stick into the conversational AI spokes.

AI agents that misunderstand or misinterpret due to poor context, feel unnatural or impersonal due to weak underlying technology...or fail to win hearts and minds by not resolving issues...risk nudging customers down the slippery slope straight into the headsets of human operators.

MANY CUSTOMERS SIMPLY BELIEVE THEIR PROBLEMS ARE TOO COMPLEX FOR AI TO HANDLE.

Conversational AI also does come with risks. Intelligence without governance creates liabilities (i.e., who authorized that specific refund?), and systems often lack built-in identity verification. This makes it difficult to distinguish between authorized agents, humans, or malicious actors.

And having the ability to seamlessly transition to a human agent based on sentiment or other triggers *must* be a foundational piece of any successful conversational AI deployment.

The reality is there's still plenty of meaningful work ahead. Many customers simply believe their problems are too complex for AI to handle.



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In our survey of nearly 5,000 consumers and more than 450 business leaders, we found that while most consumers (72%) would gladly use an AI agent if it could guarantee a faster resolution than a human, only 39% describe them as helpful. In fact, nearly half (49%) say AI never resolved their issue at all.

I fell into this mindset recently when I made a restaurant reservation with OpenTable's AI agent.

I arrived early and grabbed a seat at the bar, only to receive a text message a while later saying I'd missed my reservation. I debated calling the restaurant to clarify I was already there but questioned whether an agent could follow the nuance of the situation.

Until the gap between expectation and experience narrows, brands and their contact centers must tread carefully to ensure agents are sources of clarity and confidence, not friction and frustration.

That requires an "and," not "or," approach that gives agents both character and context: advanced voice and speech technology paired with customers' comprehensive digital signals and behavior.

CULTURAL SHIFT AT THE CORE

Conversational AI is becoming the new website, the primary way customers explore and, more importantly, interact with businesses. But for brands to embrace AI agents as true ambassadors, they must not only raise the bar for what success looks like but reimagine it entirely.

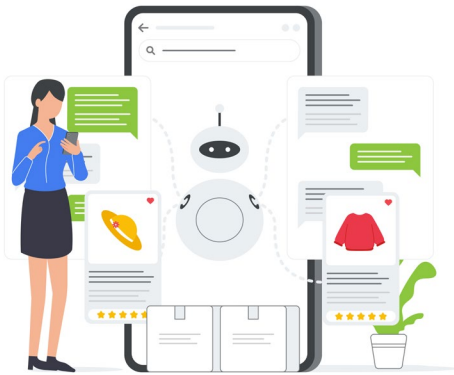
If AI promises to be the quickest, smartest operator in the contact center, should it only be measured by call containment or speed to resolution of discrete issues?

It should be a comprehensive approach, one that evaluates AI agents on a level playing field with their human counterparts. This includes key metrics like first contact resolution (FCR) and customer satisfaction (CSAT), as well as more bottom-line impact ones like churn reduction and overall cost-to-serve.



Instead of viewing AI merely as problem solvers, brands should also evaluate these agents as true concierges: capable of wowing customers with deep historical knowledge, real-time context, and unforgettable experiences.

However, achieving this requires more than a shift in mindset; it demands a cultural transformation as well. It means breaking down traditional silos between contact centers, Marketing, and Sales; connecting the dots between inbound and outbound activities and sharing customer insights often trapped in internal aisles.



INSTEAD OF VIEWING AI MERELY AS PROBLEM SOLVERS, BRANDS SHOULD ALSO EVALUATE THESE AGENTS AS TRUE CONCIERGES...

When teams and departments openly exchange these fragmented pieces of customer memory, they can solve inquiries faster, suggest better, more relevant products and services, and create more seamless and unified customer journeys.

SUPER AGENTS, SUPERB OPERATORS

Much like the ACD, IVR, CTI, and cloud-based platforms that came before it, conversational AI is the next major technological leap, ushering in a new era for contact centers.

It allows AI agents to automate the mundane while augmenting the memorable. A coach, a researcher, a marketer, and a customer archivist can now whisper in the ears of human operators, helping them show up and show out

with greater speed, accuracy, and empathy than ever before.

As the curve from experimentation to deployment continues to bow, the brands pulling ahead understand this isn't just another customer service tool but a complete customer experience (CX) transformation, one reliant on cultural evolution as much as technological innovation.

The result is unprecedented hybrid harmony, turning every interaction into a moment that reinforces to customers why they fell in love with your brand in the first place. ¹⁰



Andy O'Dower is VP, Field CTO at Twilio where he helps customers build the next generation of customer engagement. Andy brings extensive entrepreneurial, technical, and business backgrounds. He has founded and scaled platforms, B2B SaaS, and B2C products for thousands of customers and millions of consumers at Wowza, Snapsheet, and Curiosity.

CONTINUED FROM PAGE 23

HOW TO CATCH, RESPOND, AND PREVENT THE PROBLEM

The good news is that this problem is measurable and the fixes are operational. Here's a guide:

1. Catch it by scoring resolution

Read repeat contact alongside FCR and a resolution-quality score:

- FCR really just tells you whether the issue stayed in one interaction.
- Resolution scoring tells you whether it was actually settled.

...A RESOLUTION-CONFIRMATION STEP...IS THE HIGHEST-VALUE CHANGE YOU CAN MAKE...

- Repeat contact tells you whether the customer disagreed enough to come back.

Read together, those three signals surface the failures any one of them would hide. And you have to look at more than a sample because these failures cluster in conversations that individually look fine: a 2% QA sample rarely catches that.

2. Respond by treating a repeat as an escalation

In the data, effort and repetition compound. A high-effort repeat contact scored three times worse than a low-effort one, because the second attempt inherits all the effort of the first and adds the cost of rebuilding context. A repeat contact on a hard issue is not a normal queue entry and should be routed as a severity escalation.

3. Prevent it by fixing resolution

When repeat rates rise, the reflex is to build more self-service walls to keep customers from coming back. But the

data argues that you should do the opposite, as repeat contacts are symptoms of broken resolution.



On asynchronous channels like chat, email, and text especially, a resolution-confirmation step before a ticket closes is the highest-value change you can make, because a ticket that closed without resolving anything is the most expensive failure in the operation. ¹¹



Rob Dwyer is CX Executive in Residence at LevelAI and a three-time ICMI Top 25 Thought Leader. He spent 15 years training agents and contact center leaders before moving into AI transformation work, and hosts the Next in Queue podcast on customer experience.

ASSURING QUALITY AND LOYALTY IN THE AI AGE

TO DO THAT, APPLY THE FUNDAMENTALS, INCLUDING ENABLING STRONG TEAMS.



ILLUSTRATION PROVIDED BY ADOBE IMAGES

Delivering high-quality customer experiences (CXs), regardless of the interaction's purpose, who initiates it or on which channels, is the core mission of contact centers. The goal is to foster profitable customer relationships and, ideally, turn customers into brand advocates.

Achieving this goal has always been challenging for several reasons, such as but not limited to:

- Managing customer demands and issues that can be highly complex and emotionally charged.
- Ensuring the timely availability of qualified, well-trained agents who are effectively supervised and coached.

LAURA SIKORSKI



- Coping with external factors beyond customers' and agents' control, like network issues and disaster disruptions (on both ends).

Moreover, the goalposts are always shifting because of economic pressures, social changes (including customer and employee attitudes), technology developments, innovations, and new practices.

To find out how contact center leaders can best seek, and ideally ensure, high-quality, loyalty-building CXs in an ever-changing environment, we had a virtual conversation with consultant and Advisory Board member Laura Sikorski.

Q WHAT DEVELOPMENTS AND TRENDS ARE YOU SEEING IN ENSURING QUALITY, E.G., QUALITY ASSURANCE (QA) THROUGH THE CONTACT CENTER, AND WHAT ARE THEIR DRIVERS?

A: Quality assurance (QA) scoring is the assessment of empathy, accuracy, and compliance for interactions. High performance and productivity should be based on results achieved from procedural updates and targeted training/coaching.

Individual performance evaluations and productivity enhancements are still priority measurements, regardless of how many agent seats/shifts are available to answer interactions. This should *never* change in the contact center. Mentoring and coaching are the drivers here.

Achievable scores for service level, adherence, Net Promoter, first contact resolution (FCR), and customer effort should be realistic and produce a culture of continuous improvement and high performance.

However, let us not forget that staff empowerment must be reviewed and adjusted regularly. Fortunately, I am seeing more QA programs focusing on team performance.

Team peer pressure can be a powerful influence. And it may help reduce turnover by encouraging open communication, celebrating successes, supporting flexible scheduling, and promoting wellbeing. A team-based approach strengthens support and fosters a positive, collaborative environment.

Remember your Contact Center IS the heartbeat of your company and it directly influences customer and employee satisfaction as well as profits. Happy Employees mean Happy Customers.

Service level, average speed of answer, and abandon rate are the key drivers that will create meaningful customer connections and retention.

Q ARE CUSTOMERS' QUALITY EXPECTATIONS RISING AND IF SO, WHY? ARE CONTACT CENTERS MEETING THEM, AND IF SO, HOW, AND IF NOT, WHY NOT?

A: I have said this many times in *Contact Center Pipeline* articles: customers expect and demand excellent and consistent service. But customer loyalty is not what it used to be. From my own experiences, I no longer tolerate mistakes in shipping, incorrect delivery time quotes, price inconsistencies, and inconsiderate/rude agents. Unfortunately, I do find the latter increasing and I am shocked.

Budget cuts are causing short staffing and longer wait times are prevalent. I too am not as loyal as I used to be. Are you?

What happened to telephone etiquette training and the three most important words: PLEASE and THANK YOU? I'm not sure that this even exists in training programs. There is now less servicing of phone calls while researching information and agents forgetting to use the HOLD button.

So, if your contact center — and, most importantly, your company/brand — wants to retain the loyalty of customers like me, do your initial and continuous training courses include the following?

- Telephone voice
- Telephone answering
- Controlling the call
- Power talking for results
- Telephone call handling, in particular:
 - Dealing with angry/irate customers
 - Diffusing difficult customers
 - Active listening
 - Successful communications
 - Keys to customer service
 - Practical steps to problem-solving
 - The "deadly sins" of customer service
 - Customer service survival skills

"WHAT HAPPENED TO TELEPHONE ETIQUETTE TRAINING AND THE THREE MOST IMPORTANT WORDS: 'PLEASE' AND 'THANK YOU'?"

-- LAURA SIKORSKI

Also, I'm not sure why, but I do think many companies think noise-canceling headsets are outdated and too expensive. I *really* dislike hearing other agents speaking to their customers and my concentration to listen to my agent wavers. And I'm sure many other customers feel and are reacting the same way.

Moreover, chat used to be the best way to communicate with a human and was always fast and accurate despite an agent managing four to five customers at one time.

Now AI is doing the chatting and many times it (notice I said IT!) just does not react with accuracy to a question. I type fast and still have a hard time with AI understanding what is needed to help me.



Yes, I realize programming is critical to AI performance. And I think more time needs to be spent on correct answers to most of what you teach in your trainings.

Finally, how about fixing the "Press 1, Press 2, Press 3", etc. and using the KISS method for the IVR? Like "Press 1 to speak with a live agent, Press 2 to use our automated systems."

"GENERATIVE AI IS EXPENSIVE. IT TAKES TIME TO IMPLEMENT AND I DO NOT FEEL OUR SOCIETY IS READY FOR IT."

Q YOU MENTIONED AI. THERE HAS BEEN MUCH DISCUSSION ABOUT (AND INVESTMENT IN) AI AGENTS. BUT ARE AI AGENTS DELIVERING ON THEIR PROMISES? ARE THEY ENABLING IMPROVED HIGH-QUALITY CXS?

A: Generative AI is EXPENSIVE.

It takes time to implement and I do not feel our society is ready for it. Its core components are powerful algorithms, pattern recognition, and prompt-driven outputs.

But I'm not sure taking the time to get it right is a priority in many development and implementation projects. There is so much hype about AI and companies feel they must get on the bandwagon as soon as possible.

Implementing AI software that YOU think the customer wants is dangerous and can cause you to lose them. So why not invest in technology that will streamline operational efficiencies, have personalization capabilities, and integrate your customer service support channels into one platform?

Also, how about better collaboration with other departments that support customers' orders, issues, and resolution? I do think this will improve resolution speed, enhance agent confidence, and ensure consistent, high-quality experiences for every customer and staff member.

Q CUSTOMERS ARE BEING INUNDATED WITH FEEDBACK REQUESTS, I.E., SURVEY FATIGUE, SO ARE THEY SKIPPING THEM, OR WORSE YET, DELIBERATELY GIVING WRONG ANSWERS? IF SO, IS THIS TREND ACCELERATING, AND HOW DOES THIS AFFECT QA AND CORPORATE DECISIONS?

A: Feedback is necessary even if you think customers will deliberately give wrong answers. How are you going to know what your customers really want and need if you do not ask them?

Have you forgotten about the VOICE OF THE CUSTOMER as a component of your customer service philosophy?

Usually, a 5% response rate is normal, but be satisfied with 1%. How about the old-fashioned focus groups? Ask how they feel about automation and what they think AI can help with.

You do not need 20 questions. So, review your "wrap-up" code reports to identify the reasons your customers contact you and develop questions based on them.

Q WHAT ARE YOUR RECOMMENDATIONS TO CONTACT CENTER LEADERS TO HELP THEM PROVIDE A HIGH-QUALITY CX?

A: Take a deep breath and do your own internal audit to find out your center's strengths and weaknesses. Here are some thoughts on what to look for (see FIGURE).

WHAT YOUR CONTACT CENTER AUDIT SHOULD INCLUDE

OPERATIONS

- Mission Statement and department goals
- Current performance objectives
- Organization chart
- Job assignments and workflow
- Job descriptions
- Office standards

STRUCTURE

- Operational goals of the agents
- Supervisor-to-agent ratio
- Reference materials
- Types/amount of meetings
- Interaction volumes: calls, emails, chats, etc.
- Service level objectives
- Customer-based demographics and services offered
- Customer interaction types
- Call processing standards
- Current staffing and scheduling procedures
- New hire training programs/manuals/schedule
- Continuous training programs
- Intra- and inter-departmental interactions and responsibilities
- ACD reports
- Technology systems used



FIGURE

When I do audits, executive and middle management staff are surprised at what I find. Be sure you interview new and senior staff to find out what they really see, especially if you let them know the conversation is TOTALLY CONFIDENTIAL.



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



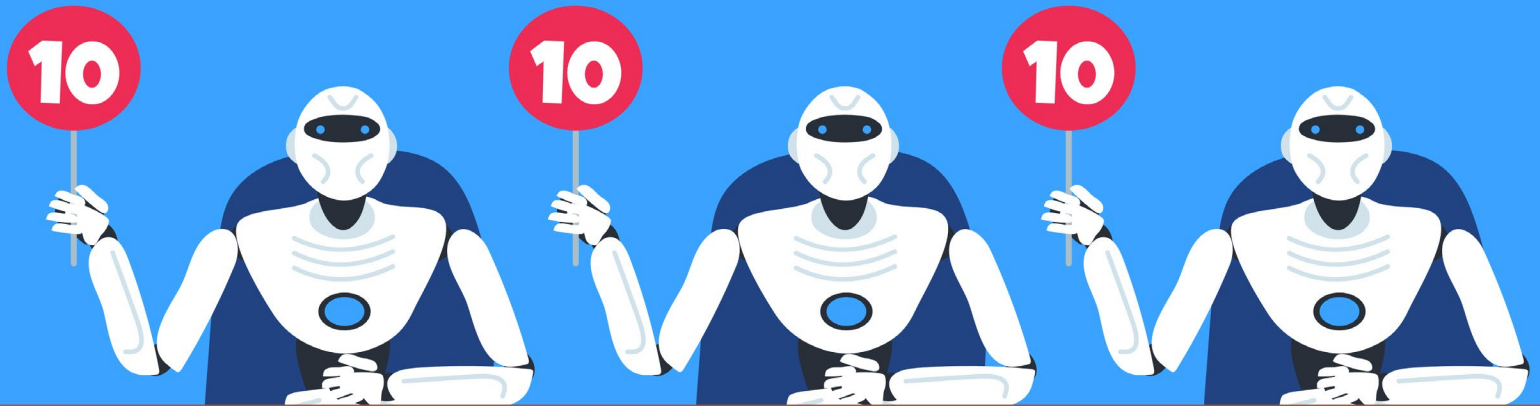


ILLUSTRATION PROVIDED BY ADOBE STOCK

WHAT "100% QA COVERAGE" *DOESN'T* TELL YOU

HOW YOU CAN ADJUST YOUR SCORECARDING ACCORDINGLY.

Ask any AI QA vendor what their product does and from what I've found you may hear some version of the same sentence:

- Zendesk QA says its AutoQA feature "evaluates 100% of interactions across digital and voice channels."
- Observe.AI promises to "accurately automate 100% of QA evaluations."
- CallMiner contrasts its approach directly against "traditional sampling-based scorecards," pitching full coverage as the whole point of switching.

• EvaluAgent's pitch is nearly identical: "100% of conversations scored automatically."

None of that is false. These tools touch every interaction instead of the 1%-2% sample a human team can realistically review by hand. That's a significant capability, and it's the reason so many QA teams have adopted them in the first place.

But coverage and accuracy are two different claims, and vendors are careful to only make one of them with confidence.



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...COVERAGE AND ACCURACY ARE TWO DIFFERENT CLAIMS, AND VENDORS ARE CAREFUL TO ONLY MAKE ONE OF THEM WITH CONFIDENCE.

THE PATTERN ISN'T WHAT YOU'D EXPECT

The intuitive version of this story is a clean split. AI is reliable on objective, rule-based criteria (Did the agent verify identity, include a required disclosure, follow the script?) and weaker on judgment calls that require reading tone or context (Was this response empathetic? Was a workaround the right call here?).

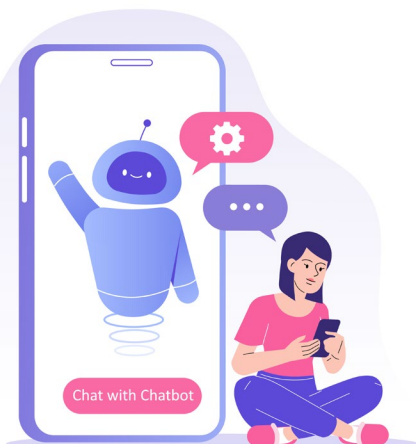
It's a tidy narrative and it's mostly what shows up when you search for commentary on AI QA limitations on Reddit.

It's also not quite right. A thread on r/callcentres from a QA lead whose team moved to 100% AI scoring is a useful reality check because the failures described there aren't cleanly sorted into "objective, handled fine" and "subjective, handled badly." Instead, they're scattered across both.

Some are the kind of failure you'd expect from a system reading tone and intent:

- One commenter described the AI penalizing an agent for "not properly ending the call" when the customer had hung up first, leaving the agent no opportunity to do so.
- Another described the tool dinging an agent for not collecting contact information from a caller who had dialed the wrong number and said so directly: a case where collecting that information would have been pointless, not required.

But others are failures on exactly the literal, checklist-style criteria AI is supposed to be strongest at. The same thread includes a description of the system missing a HIPAA violation entirely because it was checking for surface-level "call flow" rather than the substance of what was said.



THE PROBLEM SHOWS UP WHEN A CRITERION THAT LOOKS OBJECTIVE ON THE SCORECARD TURNS OUT NOT TO BE...

Another commenter described the tool failing to credit an agent for providing a website URL, because of what appears to be a punctuation-parsing quirk in how the transcript was read. A third described the system consistently mis-transcribing the company's own name.

These are mechanical failures, not subjective judgment calls.

That's not an argument against the objective side working at all. A QA consultant answering a staffing question on r/CustomerService put the vendor pitch about as plainly as anyone.

"Tools like these can transcribe 100% of calls and auto-score the objective stuff: greetings, disclaimers, compliance language, so your human QA people only jump in on the low-scoring ones where soft skills and empathy actually matter."

That's an independently stated version of the same split the vendors are selling. The problem shows up when a criterion that looks objective on the scorecard turns out not to be once you're looking at the actual call instead of the checklist.

The gap comes down to whether scoring the interaction correctly requires understanding *why* something happened versus matching a literal pattern, not whether a criterion is labeled objective or subjective.

AI is consistent when a criterion can be resolved by checking for the presence or absence of a specific word, phrase, or step. But it gets shaky the moment correct scoring depends on context:

- A compliance step that didn't apply because the customer volunteered the information first.
- A hold-time disclosure that wasn't needed because there was no hold.
- An empathetic response that doesn't use any of the phrases the model was trained to recognize as empathetic.

WHAT THE VENDORS QUIETLY BUILD AROUND THIS

You don't have to take a Reddit thread's word for it. Look at what the vendors ship alongside their 100%-coverage marketing, and in my view, you'll find features that only make sense if the vendors don't fully trust every score.

- Zendesk QA's autoscoring documentation lists specific categories the system evaluates, including empathy and tone. But it also specifies that when the system can't confidently assess a category, the interaction gets scored "N/A" rather than a forced number. That's a built-in acknowledgment that confidence isn't uniform across criteria.
- Observe.AI ships an "acknowledgment and dispute" workflow, letting agents formally push back on an automated score for a supervisor to review. A dispute mechanism only exists because the product team expects some scores to be wrong.
- MaestroQA's documentation describes a formal calibration process: humans grade a sample of the AI's outputs and produce what the company calls an "alignment score," a measurement of how closely the AI's judgment matches that of a human reviewer.

In this application, the prompts get refined and rerun based on where they disagree. That's an ongoing check against drift, not a one-time setup step, because the company that built it doesn't assume it stays accurate on its own.

- CallMiner goes further and recommends against an all-or-nothing roll-out. Teams can keep scoring manually in parallel with automated scoring "as the automation is built out," rather than switching the whole scorecard over on day one.

Put together, this is evidence that the vendors building these tools understand the coverage-versus-accuracy gap well enough to design around it, even while their marketing pages talk about "100%" without qualification.

STUDY FOUND SOMETHING SHARPER THAN "MISSES CONTEXT"

Vendor documentation and practitioner threads are useful, but a 2026 paper accepted into the Association for Computational Linguistics (ACL)'s Findings track goes further.

Researchers evaluated 18 large language models (LLMs) scoring 3,000 real contact center transcripts, then tested what happened when they held the substance of a call constant and changed something that shouldn't matter to the score. Namely a note implying the agent's identity, a customer's account tier, or a snippet of that agent's prior coaching history.

The result: pass/fail judgments flipped between 5.4% and 13% of the time across models, purely from those irrelevant changes.

The single biggest trigger was priming the model with coaching-notes history, which pushed the flip rate as high as 16.4%.

Communications style differences, direct versus indirect phrasing, formal versus casual tone, moved scores less (in the 7% range), which the researchers took as a sign that the models were comparatively better at separating what someone meant from how they phrased it.

The same paper reports raw accuracy against human-annotated ground truth across those 18 models, ranging from 65.94% for one open-source model up to 93.84% for the strongest one tested, with no consistent split between objective and subjective criteria.



Worth disclosing directly: the paper's authors are researchers at Observe.AI, one of the vendors named earlier in this piece. That doesn't make the finding less real, since it went through the same peer review as any other ACL submission, but it isn't independent industry research either.

What this adds to the practitioner accounts above is a mechanism, not just anecdotes.

A score can shift because of who reviewed an agent's file last week, not because of anything said on the call actually being scored. That's a more specific problem than "AI misses empathy": it's AI treating something irrelevant to the interaction, like who last reviewed the agent's coaching file or what tier the customer's account sits on, as if it were evidence of how the call actually went.

WHAT A PROGRAM THAT ACCOUNTS FOR THIS LOOKS LIKE

The practical version of this isn't complicated, but it does require treating your scorecard as something to audit rather than something to hand over to automation wholesale.

1. Start by sorting your existing scorecard criteria into two buckets, not by topic but by what it takes to score them correctly.

- Bucket 1, pattern-matchable criteria (disclosures, verification, mandated language).
- Bucket 2, context-dependent criteria. Everything else, anything where the right answer depends on understanding the specific situation rather than checking for a phrase, and which needs a human-in-the-loop before it gets treated as a final grade.

2. Hand over Bucket 1 to AI with reasonable confidence, and expect it to be fast and consistent at scale in a way no human team reviewing 1%-2% of calls ever could be.

That includes the two categories from the original framing, empathy and judgment calls on workarounds, but it also includes edge cases inside criteria that look objective on paper. Like a compliance step that had a legitimate

BEFORE TRUSTING AI OUTPUT... RUN IT IN PARALLEL AGAINST HUMAN SCORES FOR A STRETCH...

exception, where a script deviation was the right call given what the customer said.

Before trusting AI output for trend reporting or coaching decisions, run it in parallel against human scores for a stretch, long enough to see where the two disagree and why.

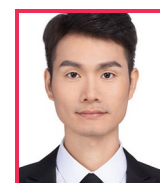
There's no single industry-standard length for this, and be skeptical of anyone who quotes you a precise week count as an established benchmark; it isn't one. What matters is the discipline of comparing before committing, not the specific calendar length.

The comparison should check more than raw agreement, too. Given what the ACL research found about scores shifting based on irrelevant context, it's worth deliberately testing whether the same call, stripped of anything about who the agent is or what happened in their last coaching session, gets scored the same way twice.

Indeed, one QA team from that same Reddit thread described the opposite failure mode; after switching to AI-driven scoring, their pass rate dropped so far that management redefined the passing threshold from 94% down to 60%.

This occurred not because performance had actually declined, but because nobody had validated the new scoring before making it the number that mattered.

That's the actual risk. Not that AI QA tools are bad at their job. It's that "100% coverage" quietly becomes "100% of scores treated as final," without anyone deciding that on purpose. 🗣️



Owen Zhang is the editor of *CommsAdvisor.com*, where he tests and compares contact center, help desk, and customer support software for buyers evaluating vendors like Zendesk, Freshdesk, and Aircall. He previously worked as a software engineer, including a stint at Huawei, before moving into independent B2B software reviews.

DRIVING THE BOUNCY CX JOURNEY

HOW CONTACT CENTERS CAN SMOOTH OUT THE RIDE.



ILLUSTRATION PROVIDED BY ADOBE IMAGES

Driving customer experiences (CXs) on profitable, mutually satisfying journeys these days can be very much like driving on today's roads.

There are greater demands to be at one's destination quickly, comfortably, and with the least amount of cost and hassle. Getting there is being enabled by new technologies like AI and innovative methods.

But the CX pathways, like today's roads, are often congested with bumps, potholes, delays, and detours. This has resulted in customers navigating often complicated, now AI-powered self-service systems and becoming stalled by long hold times to reach the right agents, who are also using AI tools.

To understand what is happening with CX and employee experience (EX), and how contact centers can make both journeys easier, we had a virtual conversation with our panel of leading supplier subject matter experts.

- **Anna Convery**, Chief Marketing Officer, Verint
- **Dana Shalev**, Senior Director, Product Marketing, GCO, NiCE
- **Eric Williamson**, Chief Marketing Officer, CallMiner

Hopefully, your center, customers, and agents will have many good trips together.

ANNA CONVERY



Q WHAT DEVELOPMENTS, ISSUES, AND TRENDS IN CX THAT YOU HAVE HEARD FROM CONTACT CENTERS OVER THE PAST 12 MONTHS WILL LIKE- LY CONTINUE INTO THE NEXT 12 MONTHS? DID THESE CHANGE FROM YOUR EXPECTATIONS?

ANNA CONVERY (AC):

The story of the last 12 months is that expectations moved faster than operations. In Verint's "The State of Customer Experience 2026 report":

- 42% of consumer respondents stated their service expectations rose over the prior year, up from 19% in 2024.
- 51% now say businesses fall short when they actually need help, the first time in five years of running this study we've seen a majority say this.

The unexpected part of this data was the cause. Businesses adopted AI at unprecedented speed, yet customers remained frustrated because most deployments stopped short of solving problems end-to-end. The data is clear that simply deploying AI is not a solution to better CX.

Over the next 12 months, I'd expect much harder questions about whether the AI initiatives are providing outcomes.

We also found that channel preference has settled around 70%/30% digital to phone, which indicates that consumers have not leaned into digital fully and abandoned the phone channel completely. I don't expect that split to change into 2027.

DANA SHALEV



DANA SHALEV (DS):

Over the past 12 months, the conversation around AI in the contact center has shifted from experimentation to accountability. 18 months ago, corporate boards were asking their organizations to do something with AI.

This year, the boards are asking what those investments cost and what they returned, and many pilots haven't survived that second question.

We expect that scrutiny to define the next 12 months as well. Here's why:

First, headcount decisions are running ahead of the evidence. More than 80% of organizations expect to reduce agent headcount within 18 months, Gartner projects, also that half of companies that are cutting support staff because of AI will rehire those roles by 2027.

Second, the economics also require a more measured approach. Gartner's January 2026 analysis projects generative AI cost per resolution passing \$3 by 2030, potentially exceeding the cost of an offshore human agent.

Not every interaction needs a reasoning model. Matching the right technology to each interaction is where the economics are won.

We're also seeing the formation of a hybrid workforce of human and AI agents. Employees increasingly see AI as a path to mastery, not replacement.

A NiCE survey highlights this trend with 84% wanting AI to reduce complexity and workload. As a result, leading organizations will start treating AI agents as a workforce, governed by the same focus as human agents on productivity, quality, resolution, and compliance.

ERIC WILLIAMSON



ERIC WILLIAMSON (EW):

Over the past 12 months, automation has been the dominant trend across CX and contact center organizations.

More teams are looking for ways to automate customer interactions, reduce manual work, and create more efficient customer journeys, which isn't surprising at all. It aligns with where most of the industry expected CX to go as AI adoption accelerated.

What I think is evolving is the level of scrutiny around automation. The past year was largely about moving quickly and proving what was possible, but the next 12 months will be more about refinement.

Organizations will need to determine whether their automation initiatives are actually improving customer outcomes, reducing friction, and meeting customer expectations.

**"...THE CONVERSATION
AROUND AI IN THE CONTACT
CENTER HAS SHIFTED FROM
EXPERIMENTATION TO
ACCOUNTABILITY."**

-- DANA SHALEV

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That also brings governance, compliance, and guardrails further to the forefront. As organizations rely more on AI and automation, they need to make sure those systems are secure, accurate, and aligned with both business goals and customer needs.

"...CUSTOMERS EXPECT QUALITY TO BE ADDRESSED IN REAL TIME, NOT WEEKS LATER."

-- ANNA CONVERY

Q HOW MUCH OF TODAY'S CUSTOMERS' SATISFACTION AND LOYALTY, OR CONVERSELY THEIR DISSATISFACTION AND CHURN, IS BASED ON THE PRODUCTS OR SERVICES THEY PURCHASE VERSUS THEIR EXPERIENCES PURCHASING AND RECEIVING SERVICE AND SUPPORT FOR THEM THROUGH THE CONTACT CENTER?

AC: CX is carrying more of the loyalty weight than product now. Two numbers from our research illustrate this: 79% say they'd switch to a competitor after one bad experience and 80% say they'd buy again and recommend that brand after a great one. *That's a thin margin on either side of a single interaction.*

Product quality is a baseline differentiator, but not the only one. CX is one of the most critical differentiators. However, most customers can't accurately evaluate a product against the alternatives they didn't buy.

Everyone can evaluate what happened when they called for help. Service is the part they experience over and over, meaning it's the piece they can describe to someone else afterward. Which is why I'd encourage leaders to stop reviewing service as a cost line.

A failed resolution isn't a handling expense. It's a retention test the brand just took.

DS: Product problems are now nearly universal. 77% of U.S. consumers experienced a product or service problem in the past year, according to a study by Customer Care Measurement & Consulting (CCMC) and Arizona State University.

When three in four customers encounter a problem, the recovery is what they judge. CCMC and Arizona State estimate that more than \$596 billion in revenue is at risk from poor complaint handling.

Not surprisingly, the American Customer Satisfaction Institute (ACSI)'s Q1 2026 data shows satisfaction falling and complaints at record levels, even as retention rose and profits soared.

It's tempting to conclude that service is fine. It isn't. Unhappy customers are staying because leaving is hard, as markets have grown more concentrated and switching costs have risen.

Service is part of what the customer bought, not separate from it. Pricing and functionality are hard to tell apart across competing brands today, but brands can still differentiate on CX.

When companies align their brand promise with the experiences they deliver, they can unlock up to 3.5x revenue growth, according to Forrester's "Global Total Experience Score Rankings, 2025," and significantly boost customer loyalty.

EW: Product quality and CX are intrinsically linked, and in many cases they compound each other.

- A poor product experience can be frustrating, but customers are often willing to give a brand another chance if the issue is resolved quickly, fairly, and with minimal effort.
- The reverse is also true. What might have been a manageable issue becomes a broader reflection of the brand itself, making customers far more likely to churn, leave negative feedback, or take their business elsewhere.

The organizations that perform best are the ones that look at the entire customer journey. It's not enough to fix product issues without improving service, and it's not enough to improve service if recurring product issues remain unresolved.

With 60% of consumers leaving a brand after just one or two poor experiences, and approximately 82% switching to a competitor after multiple negative interactions, the stakes are high. Good experiences reinforce loyalty while bad experiences reinforce dissatisfaction.

Q ARE YOU SEEING ANY CHANGES IN OR PRESSURE TO CHANGE QUALITY ASSURANCE (QA) AND QUALITY MONITORING (QM), INCLUDING CUSTOMER FEEDBACK METHODS?

AC: There's enormous survey fatigue in the market and customers expect quality to be addressed in real time, not weeks later.

Quality programs are now moving beyond whether an agent said the right thing to whether the right action actually happened.

Historically, QA focused heavily on language, process adherence, and scorecards, which can miss the issue mattering most to the customer.

For example, an agent may tell a customer, "I've processed your refund for \$153," but accidentally enter \$135. A traditional quality program may not catch that if the conversation sounded right but an automated answer validation can.

As a result, quality isn't just reviewing the conversation after the fact, but checking whether the customer's issue was handled correctly. Speed matters too.

With manual evaluations, even serious issues may not surface until days or weeks later, when the customer has already felt the impact or a compliance issue has already happened.



But automated quality gives teams a way to catch critical errors much closer to the moment they occur, so they can step in before the problem becomes harder to fix.

DS: All three of these pressures are real.

Formal feedback is drying up. Retently's study of more than 25 million eCommerce survey invitations found email response rates fell from 4.09% in Q1 2025 to 2.50% in Q4, even as survey volume nearly doubled. Surveying harder produces less signal, but the opinions still exist.

Sampling was always a limited view. Enterprise centers processing millions of interactions monthly still review under 5%, according to the Retently email response survey.

Moving to full coverage takes more than a bigger scorecard. The objective shifts from grading a sample to understanding every conversation.

AI agents should be held to the same outcome standard as human agents, but measured with a different instrument.

AI agents can be tested at a scale no human process allows, running thousands of simulated conversations before a real customer is involved, then continuously monitoring live interactions for accuracy and compliance.

Remember, if an agent serves your customers, its quality is **your** responsibility, *human or not*.

"...ORGANIZATIONS NEED EVALUATION PROGRAMS THAT ARE MORE COMPREHENSIVE, OBJECTIVE, AND TIED TO BUSINESS OUTCOMES."

-- ERIC WILLIAMSON

EW: There is definitely pressure to evolve QA, QM, and customer feedback methods as the traditional approach is no longer enough for how contact centers operate today.

Traditional QA programs often evaluate only a very small percentage of interactions, which creates an incomplete and sometimes unfair view of agent performance.

As more interactions move across digital, voice, self-service, and AI-driven channels, organizations need evaluation programs that are more comprehensive, objective, and tied to business outcomes.

Resistance to formal feedback often comes down to how it is introduced:

- If agents feel like technology is being used to watch over their shoulders, adoption will be difficult.
- But when organizations include agents in the rollout and position QA as a way to make feedback more objective, fair, and useful for career development, agents are more likely to see the value.



Additionally, although AI agents should be evaluated with the same level of rigor as human agents, they should not necessarily be judged against the same criteria.

An AI agent may need to be measured on containment, escalation accuracy, brand integrity, and how well it handles questions it should not answer.

However, human agents, especially those who are handling complex escalations, should be measured on empathy, resolution, accountability, and whether the customer's issue was truly solved.

Scorecards are still valuable, but only when they reflect what quality actually means for the business, the customer, and the agent.

The issue is not scorecarding itself. The problem lies with poorly designed scorecards that measure activity without accurately assessing performance, miss key areas of the CX, or push agents toward scripted behaviors instead of effective, human conversations.

When scorecards are optimized around the right outcomes, they become more than just a QA tool. They become a way to deliver objective feedback, personalize coaching, and help agents understand how to improve in ways that directly support better CX.

Q WHAT ARE YOUR RECOMMENDATIONS TO CONTACT CENTERS TO HELP THEM PROVIDE HIGH QUALITY CX, INCLUDING AND ENABLED BY EX?

AC: Organizations should decide what outcome they're asking AI to provide, then measure that one thing. From our research, 61% of consumers now say they'd rather talk to a human, and that number went up this year.

This isn't a verdict on AI, but on automation that gets three-quarters of the way there. So put self-service where it can finish the job end to end and put AI behind the agent everywhere else.

EX isn't a separate consideration; it's part of how the AI strategy works. Agents are telling us the work is getting harder: 94% expect AI to change their role within three years, and 61% expect more complex, technical work.

Contact centers can't ask people to take on harder judgment calls while leaving the busywork on their desk.

The companies that are doing this well get knowledge to the agents in the moment and automate manual processes end-to-end. They use the time they recover for coaching instead of handle time targets, then feed what they learn back upstream.

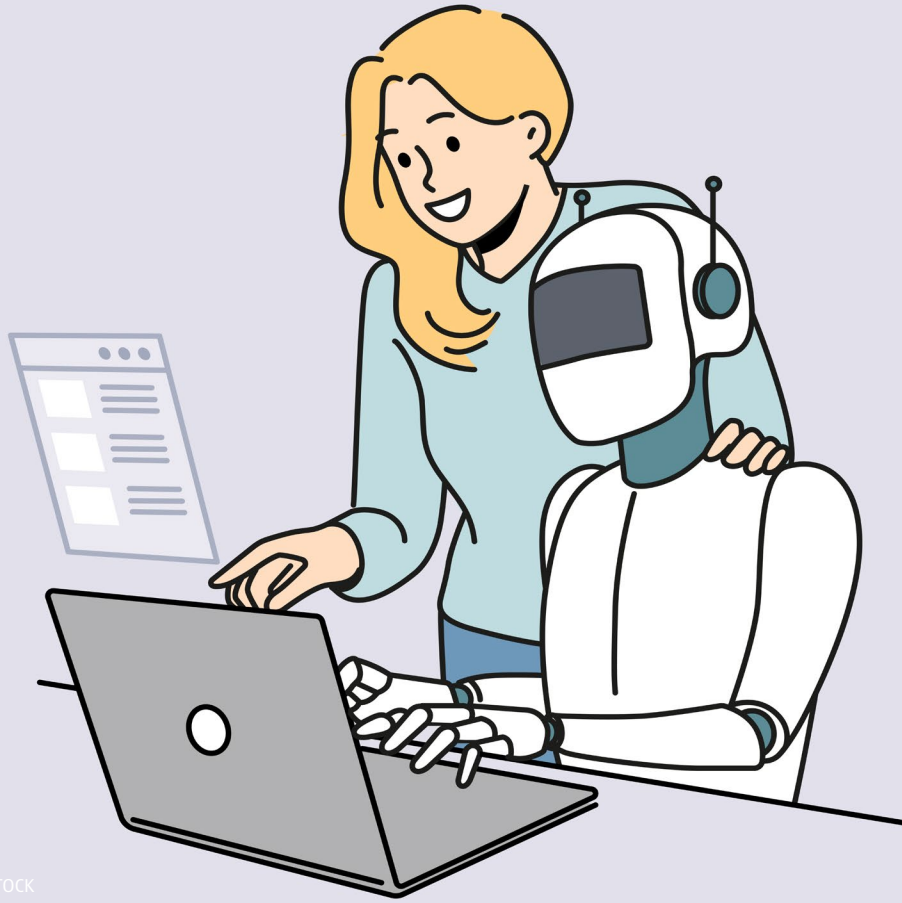


ILLUSTRATION PROVIDED BY ADOBE STOCK

WHY QA HAS TO CHANGE AI IS FORCING NEW AUTOMATED PROCESSES.

Contact centers are on the front lines of AI adoption. Salesforce research found that AI agent implementation in customer service organizations jumped from 39% to 66% between 2025 and 2026. Also, 77% of service teams with AI agents now deploy them across both customer-facing and internal operations.

In some contact centers, there are more AI agents than humans running the phone lines and answering emails. Yet many organizations still measure quality as if humans were doing all the work.

Contact centers already struggle to use the data they collect: 96% record calls but 73% don't have time to analyze them. With agents deflecting and handling more volume, the traditional quality assurance (QA) methods are becoming even less practical.

QA can no longer exist primarily to grade human representatives after interactions end.

QA IS NOT JUST FOR GRADING HUMAN AGENTS

Maintaining quality in customer service has been, and in many organizations still is, an incredibly manual process.

- A manager or QA analyst pulls a sample from a recorded call, works through a scorecard, drafts a brief evaluation of the representative, and files the feedback away for the next coaching session or 1:1.
- Those insights support the manager's relationship with the team member, guiding their career pathing and professional development goals.

- Those improvements, ideally, trickle down to customer experience (CX).

Not only is a manual process like this incredibly time-consuming from an operational standpoint, but it also only makes sense when the human representative is the one driving the customer interaction.

Today, a customer is more likely to interact with some form of automation or virtual agent before they ever reach human support. They may even get passed from AI to human, back to AI, before reaching a true resolution.



Consequently, monitoring quality on only one part of that conversation, between the customer and a human rep, leaves you with an incomplete picture of what happened.

Perhaps not surprisingly, the majority (65%) surveyed said that although their QA technology was effective at evaluating their agents' performance and supporting better training, those insights rarely translated into broader CX improvements.

Moreover, and tellingly, only 12% of respondents said that their QA insights reach the rest of the organization.

Held back by poor integration and a lack of automation, QA insights can remain trapped in the contact center, with no automated way to surface broader patterns and put them in front of leadership or the teams who can act on them.

FULLY AUTOMATED QA REQUIRES A NEW LEVEL OF CUSTOMIZA- TION AND SEGMENTA- TION...

WHAT THE NEW QA SHOULD LOOK LIKE

In the modern contact center, QA should be fully automated, accounting for the entire interactions across every channel and acting as a continuous loop to improve the entire CX that:

- Evaluates both human and AI interactions.
- Identifies what worked.
- Feeds those lessons back into real-time coaching and the virtual agents themselves.

Here is what this new automated set of QA processes should have, how it should be used, and what it can enable.

1 OUT WITH THE OLD, IN WITH FULLY AUTOMATED QA, NOT JUST THE PIECES

Automating your QA system doesn't just swap out the human reviewer with an AI-generated scorecard. It should fundamentally change what gets evaluated, the speed of insights, and what happens to those insights once an interaction ends.

2 ABILITY TO EVALUATE EVERY INTERACTION

Automated QA analyzes interactions across every channel, from voice and email to SMS and web chat, providing service leaders with a far more robust view of their service quality.

Rather than clipping samples from calls at random, management gains a rich view of what's happening across the entire CX to catch blind spots or patterns and gather more data to work from.

3 REAL-TIME AGENT IMPROVEMENT

QA doesn't work if it doesn't help your human agents improve in real time; it should never wait until the interaction ends to act.

[From our research, across industry and media sites] QA feedback helps agents improve, even though most conversations are never reviewed. That helpful feedback then lands on only a minority of interactions.

Automated QA makes it easier to quickly address gaps and errors in real time. You don't have to wait weeks to discuss a clunky call with a human agent or step out of a meeting to correct a team member.

Real-time scoring and AI-powered agent assist identify what your human agents need while they're still on a call or as they're answering a chat, surfacing relevant information or guidance in the moment. The team member gets help right when they need it. The customer gets a better experience.

4 IDENTIFY WHAT NEEDS TO IMPROVE

QA insights shouldn't live in a report or end with a coaching conversation. Automated QA goes beyond human-agent scoring to address and improve the entire agentic system.

Automated analysis can surface recurring customer issues, knowledge gaps, ineffective workflows, and places where an AI agent isn't handling a request as intended.

Those patterns give leaders a clearer picture of where the broader operation needs attention, allowing you to fix handoff moments and workflows or provide targeted coaching before the customer feels a blip.



5 CUSTOMIZED, INTEGRATED SCORECARDS

Of course, handing QA over to AI doesn't mean contact centers can simply set it and forget it. Organizations still have to decide what they're looking for, how quality should be measured, and what happens when the system finds a problem.

After all, AI can't evaluate an interaction well if the organization hasn't established what a successful outcome looks like.

Fully automated QA requires a new level of customization and segmentation because quality doesn't mean the same thing for every interaction. A customer calling to resolve a billing issue may require a different scorecard from a prospect calling to make a purchase decision.

Organizations should be able to define scorecards around their specific use cases, while AI evaluates interactions against those criteria. And those scorecards need to apply to both human and AI interactions.

But you have to evaluate AI differently from humans. A human agent can be evaluated on whether they provided accurate information, followed the right process, and resolved the customer's issue. AI needs to be held to the same standards, but the workflows themselves need to be evaluated more closely.

So, put in the processes that ask whether the AI:

- Used the right tool?

AUTOMATED QA SHOULD THEREFORE EVALUATE THE ENTIRE JOURNEY...

- Took the right action?
- Recognized when it couldn't solve the problem?
- Escalated at the right time?
- Preserved the customer's context?

A natural-sounding conversation isn't enough if the AI fails to take these steps and actions.

6 ENTIRE CUSTOMER JOURNEY EVALUATION

Automated QA must also keep up with increasing complexity. Contact centers are moving beyond simple bots toward agentic and multi-agent experiences, where specialized AI agents may handle different parts of a customer's request.

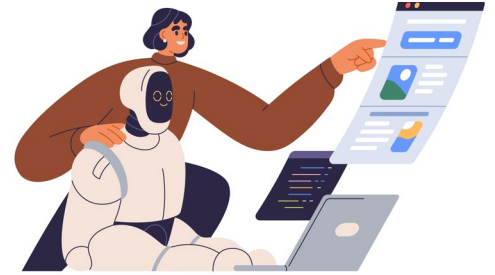
For the customer, however, the technology behind the interaction matters less than whether each handoff brings them closer to a resolution. According to our Closure Index, 85% of consumers say the ability to move seamlessly from AI to a human when needed is important to achieving true resolution.

Automated QA should therefore evaluate the entire journey, including whether the right agent handled each task, whether context was preserved, and whether a handoff happened at the right moment.

As systems become more autonomous, evaluating how those pieces work together becomes more important than assessing individual responses in isolation.

SHAPING THE QUALITY OF CUSTOMER EXPERIENCES

QA used to be the last step in the interaction: review what happened, assign a score, and move on. In an AI-powered contact center, it can become part of what happens next.



Instead of simply documenting performance, fully automated QA turns every interaction into an opportunity to improve your CX. The result is a QA process that doesn't just measure quality. It shapes it. ⑥



David Karandish is the Founder and CEO of Capacity, an enterprise SaaS company headquartered in St. Louis, MO. Capacity is the agentic support automation platform that powers every customer experience activity from a single AI knowledge orchestration layer. More than 20,000 organizations rely on Capacity to automate customer and employee support.

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• CUSTOMER EXPERIENCE

DS: First, start with your interaction data. Pull the conversations with high satisfaction, no callbacks, and short handle time. That's the answer your best agent already gave, and it becomes the foundation for everything you automate.

Second, match the tool to the job. Routine questions like order status call for a deterministic answer, delivered quickly and at low cost. Reserve reasoning models for the complex, frequent, multi-intent conversations where they earn their cost.

Third, build compliance rigor in from the start, not at user acceptance testing. In a regulated context, one hallucination is one too many, and that constraint should shape the architecture from day one.

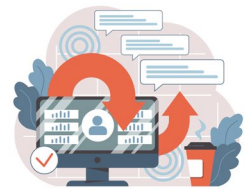
On EX, be honest about the math. Automating routine work leaves agents with queues of difficult, high-stakes, often emotional conversations.

Gartner found nearly 80% of organizations plan to move agents into new roles and 84% are adding skills to agent profiles. That harder queue deserves to be paid, staffed, and coached for.

EW: Listen to what customers are actually telling you. Organizations cannot deliver high-quality CX if they do not understand what customers want, where they are experiencing friction, and what changes would make their experiences better.

Customer insights should be used to drive real operational improvements, not just measure performance after the fact.

Recognize that CX and EX are directly linked. Agents who are supported, coached, and equipped to do their jobs well are more likely to deliver strong CXs. That becomes even more important as automation shifts more complex interactions to human agents.



Use AI and automation to remove unnecessary burden from employees. Automating tasks like call summaries, after-call work, dispositioning, and other repetitive administrative work gives agents more time and energy to focus on customers.

The goal should not be automation for its own sake. The goal should be better outcomes for customers, employees, and the business. ⑦



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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