Contact Centers

For **dummies**®

A **Wiley** Brand

Assessing the value
a contact center adds

Weighing cloud-based versus
on-premises contact centers

Demystifying bots,
automation, and AI

Brad Whittington

Dialpad Special Edition

About Dialpad

Dialpad pioneered the first AI-powered customer communications platform, creating the secure foundation for unified communications as a service (UCaaS) with Ai Collaboration and contact center as a service (CCaaS) with Ai Contact Center and Ai Sales. By bringing all conversations together in one place, businesses of all sizes can instantly unlock the power of AI to unite people, automate tasks, and turn conversations into opportunities. Supported by notable investors like Andreessen Horowitz, Google Ventures, and ICONIQ, Dialpad is a dynamic force in AI technology, with a rapidly expanding presence. To learn more, visit www.dialpad.com.

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Contact Centers For Dummies®, Dialpad Special Edition

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Introduction

Does your contact center make a difference to the bottom line for your company? Absolutely. The better question is: What kind of difference does your contact center make? Does it add value or create friction?

The not-so-secret secret is that acquiring a customer costs more than keeping a customer. According to *Forbes,* typical new-prospect sales conversion rates fall in the 5 percent to 20 percent range, while existing-customer sales conversion rates fall in the 60 percent to 70 percent range. In other words, existing customers say "yes" more than three times as often as new prospects.

In a post-pandemic era, the customer experience (CX) playbook has been rewritten. Customers are no longer willing to settle for a nine-to-five experience. They expect first-rate service 24/7/365.

This kind of customer support can't be achieved with a phone line, a notepad, and a Rolodex. The good news is that contact center providers are stepping up to the plate and filling that need.

New contact centers are built in the cloud to provide flexibility and scale for agents and businesses. They offer support through multiple channels, including social media, online chat, and email, and they can integrate seamlessly with other software. Modern contact centers leverage the latest advancements in generative artificial intelligence (GenAI) and large language models (LLMs) to provide natural-language, contextually relevant answers to agent questions based on all connected knowledge. Instead of presenting agents with an overwhelming amount of information, modern systems streamline the delivery of information, equipping agents with all the tools to deliver a great CX.

About This Book

Contact Centers For Dummies consists of six chapters that explore the following:

>> How to run an effective contact center (Chapter 1)

>> Deciding between cloud and on-premises contact centers (Chapter 2)

- » Focusing on your strengths (Chapter 3)
- » Adding value to your contact center with automation and AI (Chapter 4)
- » Building AI into the core (Chapter 5)
- » Ten ways to take your contact center to the next level (Chapter 6)

You can read this book straight through front-to-back, and it won't hurt a bit. You can also jump around to the juicy parts, and that will be equally painless. (All the parts are fairly juicy, so be careful what you skip.)

Icons Used in This Book

I use a few icons in the margin throughout this book. Here's a guide to what the icons mean:

Anything marked by the Tip icon offers concise, distilled nuggets of knowledge and wisdom you can use to smooth your path.

Anything marked by the Remember icon pinpoints information we tend to forget in the heat of the moment but that are critical to success.

The Warning icon alerts you to the stuff your mother warned you about. Well, probably not, but it does offer practical advice to help you avoid potentially costly or frustrating mistakes.

Beyond the Book

I squeezed all I could between the covers of this book. For even more information, head to `www.dialpad.com/demo`.

Chapter **1**

Running an Effective Contact Center

Back in the day, call centers were very popular, but now, the contact center is driving customer interaction.

What's the difference? A *call center* handles phone calls and maybe email. A *contact center* handles customer interactions via multiple channels, from phone calls and texts to social media and more.

TIP

A 2023 Salesforce report showed the most favored channels for customer service were chatbots, telephone, and social media.

Although offering more options enhances customer accessibility, it also complicates the task of ensuring excellent service across all channels.

And for a customer, the only thing worse than a technical problem you can't solve is having an experience with support that makes you want to bang the phone on your desk (or perhaps on your head).

Fortunately, although bad support experiences can be problematic for customers and agents alike, they are fixable. But what if you could dial the percentage of bad calls down to single digits? Or zero?

Every year, more contact centers are designing their services for excellence by incorporating cutting-edge technology and adopting best practices.

I'm not saying that the globe has achieved call-agent nirvana, but long wait times and a single channel for contacting support are becoming a thing of the past. More centers are embracing customer-centric operations, and that trend will continue. But customer-centric operations don't happen by accident — they require a solid plan and team adherence to that plan.

This chapter explores the evolution from traditional call centers to modern cloud-based contact centers, and how to identify and assess key performance indicators (KPIs) to optimize your contact center to achieve your business goals.

Building a Contact Center in the Cloud

It started back in the '90s with a groundbreaking question: Instead of carrying phone calls over the traditional voice network, why not treat voice like data and route it through the data network? And, thus, Voice over Internet Protocol (VoIP) was born.

A decade later, VoIP was mainstream, and businesses were benefiting from improved communication systems and reduced costs for traditional landline service. As VoIP became more common, the demand for flexible, scalable solutions grew, paving the way for cloud-based systems and the development of unified communications as a service (UCaaS).

With the cloud, multiple individual communication systems were consolidated into a single system that could be accessed from any location with an internet connection. This shift allowed businesses to move away from cumbersome on-premises telecom hardware to a more efficient and flexible way of managing their communication systems.

UCaaS brings more to the table than just scalability and cost-effectiveness. Its benefits also include robust security, enhanced mobility, and advanced tools such as artificial intelligence (AI)–powered chatbots, virtual assistants, and comprehensive analytics, all of which help businesses operate more efficiently and improve customer interactions.

Although the technology behind UCaaS and contact center as a service (CCaaS) can be complex, the goal is simple: to deliver a cloud-based solution for managing contact centers, as defined by standards from the U.S. National Institute of Standards and Technology (NIST). For those interested in the technical details, NIST provides thorough documentation, but the key takeaway is that CCaaS allows businesses to run a contact center on a pay-as-you-go basis, much like other cloud services such as software as a service (SaaS) and infrastructure as a service (IaaS).

For businesses, that means turning up a fully functional contact center without a huge capital improvement project.

You're welcome.

TIP A 2021 Grand View Research report projected that the global market for CCaaS would reach $10.8 billion by 2028, with a compound annual growth rate of 15.7 percent.

Defining Key Metrics for Business Outcomes

WARNING When you're running a contact center, you can easily get pulled down into the minutiae and lose sight of the larger picture. Instead, align, define, and standardize success metrics such as these key indicators that measure the health of your contact center:

» **Agent utilization:** The number of calls per agent tracks how many calls an agent handles in a given time period. There is a sweet spot that lies between an agent with time on their hands and an agent bordering on burnout. Finding the balance is crucial.

According to the MetricNet benchmarking database, the average agent utilization for service desks globally is around 48 percent. Do you know where your agents reside on that spectrum?

» **Agent productivity:** Managing the workload of agents is a good start, but training discerning agents improves both customer satisfaction and agent efficiency. Track the average handle time (AHT) per call, which should be balanced to avoid inefficiency or rushed service, and the first call resolution (FCR) rate, reflecting how often issues are resolved on the first contact. Additionally, track adherence to schedule and after-call work (ACW) time to ensure agents are focused and efficient.

» **Ramp-up time for new agents:** In 2023, the SQM Group reported that the industry standard for call center turnover is 30 percent to 40 percent. New agents must be effectively enabled and trained quickly. Traditional onboarding in a classroom or desk ride-alongs don't cater to the working arrangements of the hybrid or remote workforce of the modern day.

» **Knowledge level of your agents:** With the rise of AI-assistants, bots now answer the easy questions, which means only the hard questions are escalated to agents. These days, agents must be adept at using tools designed to help them navigate a complex knowledge base to extract the answer. Knowledge must be set up in a way that is accessible to your agents, no matter their tenure. Whether you have 5 or 500 agents, new or experienced, they must be trained on the same information and the proper delivery of that information.

» **Self-service resolution rates:** Evaluate and optimize the effectiveness of your interactive voice response (IVR) systems and chatbots to resolve issues without intervention from agents.

» **Skill-based routing accuracy rates:** When self-service doesn't resolve the issue, how accurately does the system identify the best available agent and route the customer appropriately?

» **Real-time agent-assist success rates:** How helpful was the AI-assist feature during agent onboarding and live calls?

» **Call outcome and agent follow-through:** Document the outcome of the call, including notes and disposition, to help with analytics and provide context for future calls. Was it a success or an escalation? Is follow-up necessary?

>> **Customer satisfaction rating:** How did the interaction impact brand value? Traditionally, contact centers measured customer satisfaction via surveys and post-call ratings, which typically yield response rates of less than 10 percent and represent only the extremes of very satisfied or very unsatisfied. Setting up a system that has accurate, relevant and actionable sentiment monitoring will allow for tighter and faster customer interactions.

Call center analytics are central to understanding traffic patterns, abandon rates, and staffing profiles, and identifying training and performance gaps among agents. The right coaching tools allow call center managers to provide consistent feedback to agents, measure performance, and track progress over time.

REMEMBER The contact center serves a mission–critical function. Software and analytics play a key role in providing you with an understanding of your agents' efficiency and discovering how to increase your team's productivity over time.

Assessing the Value That Your Contact Center Adds

Gathering contact center analytics that cover the performance of every aspect of your operations is important for large and growing contact centers, allowing you to gain crucial insights into the health of the business. Collecting the data on metrics such as call volume and resolution rate is fairly simple, but contextualizing that data for actionable insights and digging into the content of those conversations at scale is quite another matter. But by taking your analytics beyond basic KPIs into analytical insight, you can gain a deeper understanding of your customers' experiences — what they complain about, what they like, and many other sentiments.

TIP Here are a few ways you can use data and analytics to evaluate the value your contact center brings to the organization:

>> **General call analytics:** From missed calls to abandoned calls, these basic KPIs give supervisors a clear view of how the team is performing at all times. In addition, analytics

have evolved to provide actionable business-driven KPIs, such as the customer satisfaction (CSAT) score and the percent of resolution via bot, which means the customer finds the answer themselves via chatbot without engaging an agent.

» **Business intelligence (BI):** You can create customized reports using all your contact center data and understand your business in new ways. A full-featured BI tool uses your data to create advanced customizations and generate reports designed specifically for your business.

» **Heat maps:** Heat maps show call volume patterns and other statistics such as average speed to answer. They enable contact center managers to identify the busiest days of the week and schedule the workforce accordingly.

» **Real-time transcriptions:** AI-powered contact centers can offer real-time transcriptions of ongoing conversations, providing valuable insights to agents as they engage with customers, even in the absence of their supervisor. These live transcriptions also enable supervisors to swiftly review the conversation and grasp the context before determining whether to intervene and offer assistance.

» **Live sentiment analysis:** That same real-time AI power can also analyze the sentiment of a call in real time and assign it a rating, which helps managers and supervisors to easily keep an eye on every active call and spot challenging conversations more quickly. This sentiment data can be more powerful and insightful than traditional sentiment surveys.

» **IVR analytics:** You can customize your call routing and IVR menu options and use analytics to see which menu options are being used by callers and which aren't. This information enables you to continually optimize the caller experience.

» **Robust compliance measures:** Strong compliance measures are integral to a well-functioning contact center, ensuring adherence to stringent security and compliance standards. This includes the utilization of application programming interfaces (APIs) for the automatic disabling of call recordings and the redaction of personally identifiable information (PII). Moreover, such centers provide comprehensive in-meeting controls that allow for the muting of participants, the removal of unwanted guests, and the

admission of attendees through a virtual waiting room during virtual meetings. These features are of paramount importance for organizations within highly regulated sectors, including health care, real estate, and education.

TIP

» **Advanced workforce engagement capabilities:** Proactive managers take advantage of advanced call center workforce management and quality management features, such as forecasting, scheduling, and gamification.

CASE STUDY: INTERNATIONAL LEGAL ASSOCIATION STREAMLINES OPERATIONS

Consider the case of an international legal association of lawyers and law students that creates and maintains the code of ethical standards for lawyers.

With more than 1,000 phone lines across offices worldwide, providing flexible and efficient member support is critical to the team's success. But their previous on-premises phone system wasn't working well for them — it was costly, time-consuming, difficult to use, and most important, didn't work in a remote-first environment.

The association's director of technology operations said, "We couldn't work remotely during the pandemic, and there was a significant cost associated with our on-prem solution. We wanted something more flexible and cost-effective."

It was time to look for a new voice-and-contact center solution that could grow with their organization in a remote, post-pandemic world to serve their global offices across the United States, Africa, Asia, and South America. Their legacy on-premises voice solution consisted of different phone solutions at each location. They needed one unified solution, a voice-and-contact solution that enabled their service center team to be more mobile.

Because the new AI-assisted contact center solution automated many tasks that previously took weeks to complete, the legal association saved quite a bit of time.

(continued)

"Managing their own accounts, setting out-of-office modes, automating SMS [Short Message Service, or text] replies, and rerouting calls to another person by just clicking a button — all that has made it easier on our users. These changes used to take up lots of time and money. Not anymore."

Now, expanding and adjusting call flows and adding new users is done with just a few clicks in the online dashboard.

"With our on-prem solution, when we wanted to make a change in a call flow, we would have to hire a developer to make the change. This involved writing, developing, testing, and implementing the code. We can make those changes in seconds now," reports the director of technology operations.

The new system provides insights into call quality, call volume, call duration, and overall team performance for the association's service center. As a large service center with more than 1,000 phone lines, these contact center analytics are essential in determining how agents perform on calls.

"Before, we didn't have visibility into call analytics. Now our agents use the dashboard to keep them informed of daily call activity and statuses of other agents, so they can measure their own performance against others."

With real-time transcriptions, the service center team can easily locate calls, search for keywords mentioned in calls, pick out keywords that keep coming up on calls, and use them to train agents on how to answer these questions more effectively.

Chapter **2**

Choosing Between Cloud and On-Premises

I n the beginning, computers consumed a full city block. When computers were reduced to the size of a refrigerator, they were assembled on-premises at the main headquarters in special rooms called *data centers*. A data center is like the home base for a company's digital world. It's the place where all the important computing equipment and data are stored, managed, and shared. Think of it as the central hub that keeps everything running smoothly behind the scenes.

In the beginning, data centers were expensive. They ate up a lot of real estate in the corporate office, pulled dozens of megawatts of power, required tons of air-conditioning, and employed a small army of experts to keep them running.

Now data centers are in the cloud, where a trusted and secure third-party provider keeps them powered, cooled, and running.

In a cloud-based data center, all the computing power, storage, and networking are provided as a service over the internet. Companies can access and manage their data and applications from anywhere without worrying about maintaining physical hardware. It's scalable, flexible, and often more cost-effective than running your own data center.

As with so many things in life and business, it comes down to a trade-off. And eventually, the question arises: Is it worth it?

This chapter gives you the information you need to develop a data center that will leverage your staff and institutional knowledge to assist and delight your customers.

Comparing Pros and Cons

Speaking of trade-offs, how does on-premises stack up against the cloud?

On Premises	Cloud
Complete control over hardware and software refreshes and upgrades, but must pay 100 percent of costs for hardware, software, and specialized personnel.	Costs for hardware, software, and head count are rolled into fractional charges from the infrastructure provider. (A 2021 Metrigy report showed that single-provider unified-communication solutions deliver a 56 percent lower total cost of ownership.)
Must maintain relationships with multiple contracts and vendors for goods and services.	Maintain one relationship for all services.
Must set up and dimension access and size of the equipment, leading to overprovisioning to account for peak periods and leaving the extra capacity unused in nonpeak periods.	Provisioning is done for you, and capacity is elastic, scaling up or down according to your needs.
Requires specialized lines.	Needs an internet connection.
Creating a hybrid environment — specifically post-COVID, with on-premises equipment — often requires expensive virtual private networks (VPNs) to get connected, which can be difficult to deploy and maintain.	Requires only an over-the-top internet connection for secure communications that is ubiquitous and easy to access.

The case for the cloud has momentum. Currently, 50 percent of new unified communications licenses bought by organizations are cloud-based.

Maximizing Speed to Innovation

Business moves fast and technology moves faster. The good news is that, in this case, technology has come to the rescue by accelerating the speed of deployment.

A new on-premises solution requires long deployment windows, routinely stretching to six months or longer. The cloud also has a deployment window, including onboarding and training users for the launch, but it's a significantly smaller window than is required for on-premises solutions.

With on-premises solutions, when something is broken, it usually takes a long time for a patch to be released. When a patch release is available, migrating an on-premises solution to a new version takes another long deployment cycle.

In contrast, cloud deployments have made upgrades obsolete. Periodic upgrades are replaced by continuous incremental improvement releases on a regular basis, typically weekly, making it easy for users to absorb new features. In addition, the modern cloud uses microservices, in which functionality is self-contained in modules, so it's easy to update only the code that contains the issue or new feature and leave the rest of the code untouched. The result is faster time to fix.

The cloud removes the barriers to innovation caused by the infrastructure and gives your teams immediate access to cutting-edge capabilities.

Futureproofing Your Contact Center

The clear trend in contact centers is a movement to the cloud, and one of the major drivers is the work-anywhere movement.

In the past, contact centers were limited to recruiting whatever talent they could find within a 50-mile radius of the physical plant.

Now that it has been demonstrated that it's possible to have a productive remote workforce, more companies are reducing their physical-plant footprint and casting their recruitment nets farther. This development has resulted in operational expenditure

(OpEx) savings of a smaller facilities footprint and opening access to top-tier talent regardless of their location.

Another benefit from technology trends is the emergence of artificial intelligence (AI) as a productivity enhancer. AI can accelerate issue resolution by identifying the right resource to address the problem and including the full context of the call. This enhancement supercharges handoffs between agents, and automatically expands the reference library of bugs and their associated fixes.

Most on-premises solutions were built before AI was even on the radar, much less deployed. Not only is AI not baked into their solutions, but many solutions also don't even have an application programming interface (API) to plug AI into as an add-on. By contrast, cloud-based solutions make it easy to adapt and expand to embrace newer, efficient technologies and add more capabilities, such as security against ransomware.

Speaking of security, some on-premises solutions run on older operating systems, which have well-documented weaknesses that are easy for hackers to exploit. That translates into a lot of work for the local IT team as it tries to keep the system secure, as well as a dependency on legacy vendors to keep up with security patches.

In recent years, some older vendors needed to catch up in cybersecurity and now focus more on reacting to threats than preventing them, like playing a game of Whac-A-Mole with hackers. As a result, many of these companies have gone bankrupt or been acquired, which reduces their staff and makes it even harder for them to keep up with security risks.

The good news is that modern cloud-based solutions, such as Amazon Web Services (AWS), Google Cloud Platform (GCP), and Microsoft Azure, use the public cloud and have a fully staffed team of experts keeping their solutions secure.

REMEMBER

The bottom line is that when you're in the business of delivering the best possible user experience to your customers, you have to build your contact center infrastructure on technology that can enable your agents to work with maximum efficiency and effectiveness.

Chapter <u>3</u>

Focusing on Your Core Strengths

Your company exists to address a market need or bring something new to the world. You probably have a company mission statement, which means you're literally on a mission. And that mission probably isn't building contact centers.

That being said, contact centers are mission-critical, because they handle all your customer interactions. And no business is successful without customers.

Stephen Covey was onto something when he said, "The main thing is to keep the main thing the main thing." Sometimes it seems like the universe is working overtime to derail you, pointing out urgent issues to send you on a rabbit trail or dangling shiny new objects to lead you down the garden path.

That's when it's time to double down on the main thing.

This chapter gives you pointers on how to remove obstacles to productivity and excellence so you can focus on your mission and care for your customers throughout the full customer life cycle.

Keeping the Main Thing the Main Thing

Companies looking to improve the quality of their contact center customer experience (CX) tend to focus on a handful of core issues:

» They need to get their agents operating as productively as possible so agents can help their customers be productive.

» They aim to reduce operational costs without impacting CX.

» One of their primary objectives is to simplify and consolidate their tools and deal with fewer vendors so they can spend more time on customer-facing issues.

» One of their major pain points is losing customer context when they shift from one channel to another, which increases the time it takes to resolve customer issues.

» They want to differentiate themselves from their competitors by making their customers' day better with a personalized and delightful experience.

» They're looking to improve accuracy and compliance, and they've heard that artificial intelligence (AI) may help.

The good news is that an AI-assisted contact center system can help with all those issues.

AI is key for personalization. In any given incident, customer details can trigger different resolution paths, options, or workflows. Is it a new customer? An existing customer? A premium customer? Which channel was the original point of contact? Do they have stored profile preferences? Is there already an open ticket?

The workflow follows the path of most relevance, omitting hard-coded steps the customer must click past.

Tool consolidation has multiple benefits for the contact center, including the obvious one point of contact, but it also means there's only one contract to review, which makes it easier on the legal department and easier to process through procurement.

WARNING

Having multiple vendors typically results in higher overall costs, multiple contract lengths with different terms, and constant switching between apps for agents. It also involves redundant IT management for each tool and navigating the renewal process independently for each vendor.

When you consolidate tools, you have only one vendor to deal with, and the buck stops with that vendor.

There is also the obvious fact that you already have a day job, and it's not being a systems integrator. There's no margin in your schedule to spend hours, days, or months figuring out how to stitch together a technology stack. That's why you have a vendor.

WARNING

It pays to do your due diligence. Some cloud vendors pitch a unified communications as a service/contact center as a service (UCaaS/CCaaS) solution, but behind the curtain they use multiple providers, resulting in siloed reporting and a breakdown in the CX when contacts go from unified communications to contact center.

Picture, for example, a contact center that offers UCaaS as an add-on, but it's not truly connected to its contact center software. Because the contact data exists in two separate systems, customer history won't be consistently available to agents.

A truly unified UCaaS and CCaaS platform with a built-in AI solution that almost all businesses, indeed all industries, will need, future-proofs your communications.

TIP

Before signing up with the next UCaaS or CCaaS provider you see, make sure you understand the company's ability to support you based on their platform and their innovation road map. From there, find out how they can help improve your communications and your business beyond just the standard cloud benefits.

The preferred implementation will always be a system that was designed from the beginning with a UCaaS and CCaaS workflow in mind: a single application on a single network with a single analytics stack and a single AI stack. All built with one goal in mind: ease of use.

Eliminating Needless Obstacles to Innovation

Innovation is the best enabler of staying power. Many times, it comes down to one axiom: Innovate or stagnate.

Digital engagement is a marketing tactic that assists a business using digital channels to interact with, connect with, and build relationships with customers.

Contact center effectiveness is enhanced when agents can stay focused on more complex cases and strategic work, and AI-powered chatbots, leveraging a large language model (LLM), can engage customers effectively and reduce the volume of calls for lower-tier, routine requests.

Questions for the agents get more complex because simple questions are now answered by bots, so agents become more like knowledge workers. They use AI assistants to query a knowledge base that is customized to your business. They also cross over from CCaaS to UCaaS, and vice versa. This function can't be supported by an integrator. It requires a purpose-built solution.

Digital engagement breaks down barriers in the company and creates a more seamless CX. For example, marketing typically owns social media accounts and shares messages and posts. But when customers engage and ask questions, marketing can't always answer the product-focused or more technical questions, which causes customer frustration.

The value of digital engagement for a contact center is that it can automate up to one-third of all customer service interactions, which frees agents to devote more time to personalized and empathetic customer service.

Digital engagement creates more margin in your workforce in many ways. For example, AI-powered customer service works out of the box to determine customer intent without pretraining, saving most of the time and cost to deploy AI. Customers connect from any channel and a virtual concierge determines their intent and resolves the issue via self-service or routes it to the agent with the right skill set.

Self-Service Domain	Query
Knowledge hub	"What's the status of my order and shipment?"
Task workflow	"How do I schedule an all-day meeting with on-site and remote participants?"
Contact center agent	"I received an invoice for services I didn't use."

One aspect of digital engagement is that it compiles key performance indicators to quantify engagement and help rightsize the organization. Digital engagement enables you to find the answers to questions such as:

>> How many sessions am I serving right now?

>> Do I need more agents to meet my service levels?

>> How long are customers waiting in the queue?

>> Are we meeting our committed service-level agreements (SLAs)?

>> Are any channels overloaded?

Analytics provide insights into CX orchestration, answering questions such as:

>> How many customers engaged with us today?

>> Are customers completing surveys and rating us well?

>> Are the bots understanding our user requests?

>> What is the trend in total engagement?

>> How did customer sentiment score during the past month?

Extending Omnichannel into the Full Customer Life Cycle

You've probably been there: You have a frustrating issue with a product, so you go to the company's website, where a chatbot impersonating a sympathetic bartender encourages you to pour out all your troubles. When it becomes apparent that your issue is beyond the bot's meager abilities to resolve, it kicks you upstairs to an agent, and you're back at square one, starting with "Once upon a time . . ." and repeating all the things you just spent ten minutes telling the bot.

And that's why you need omnichannel customer service.

REMEMBER

Omnichannel customer service allows agents to see a customer's interactions across all channels, including phone; email; social media; live chat; Short Message Service (SMS), commonly known as text; chatbot; virtual agent; webinar; and community forum.

WARNING

In the effort to deliver an omnichannel experience, too many businesses struggle to bridge the gaps caused by organization silos. The group responsible for the phones isn't the same one developing the website, which isn't the same as the one in charge of forums and social media. Consequently, the context and incident history of a conversation falls into those gaps when customers switch channels.

But that great divide isn't visible to your customers. They assume that you're gathering information about them every time they engage with your brand. In fact, they're counting on it. They want you to automatically know what they want before they even say it — maybe even before they know that they want it.

REMEMBER

In fact, an Invesp report found that companies that embrace omnichannel and increase customer engagement have customer retention rates that are almost *three times* the rate of companies with weak omnichannel strategies. Personalization generates connection.

When you want to catch fish, you go where the fish are biting. And when you're fishing for customer engagement, you make sure you're on the channels where your target demographic hangs out. Instead of a shotgun method of creating a presence on every new channel that pops up, focus on channels your customers frequent. Test the relevance of your channels by tracking customer traffic and closed cases per hour.

Also, consider the impact on your team. Some channels, such as text and chat, require constant attention, and you have to be able to properly staff them before you commit, instead of scrambling to catch up when it's more successful than you anticipated.

Your omnichannel solution must be able to route customer requests on all channels through the same platform and apply unified business logic for all channels to efficiently optimize available resources.

To achieve the omnichannel visibility required to meet customer expectations, your customer relationship management (CRM) system and your contact center must be tightly coordinated. When you establish the CRM system as the single source of truth for all things related to customers, you guarantee that all channels are on the same page. The result is that all service agents can speak as one, which reduces friction and accelerates time to resolve.

The increased visibility that comes from integrating the contact center and the CRM enables consolidated reporting and statistics for both real-time and historic interactions.

To minimize disruption to day-to-day operations, start your search for an omnichannel solution with a list of evaluation criteria to objectively compare solutions and pick the best one for your environment.

REMEMBER

In addition to optimizing CX, be sure to evaluate the agent experience (AX). Happy agents make for happy customers!

Chapter **4**
Adding Value with Automation and AI

The origins of automation go all the way back to industrial processes in the eighteenth century. The original application of automation was operating mills — the first a spinning mill and the second a flour processing mill. For the next few centuries, automation revolutionized all kinds of industries. In contrast, practical artificial intelligence (AI) implementations are relative newcomers. Both AI and automation are good at offloading simple tasks that humans would rather not take on, but AI has made great strides in the twenty-first century, taking on tasks that seemed beyond its capabilities just a few decades ago.

The first generation of bots used in support applications had a tendency to be frustrating. Sometimes it felt like you were talking to a myna bird. The chatbots seemed to be designed more for the purpose of keeping customers away from human agents than to provide actionable help. Consequently, experience with chatbots trained many users to ignore the bot, even at the cost of enduring a lengthy wait on hold in a queue, rather than search for the secret phrase that would resonate with the bot and unlock the resolution.

But the long nightmare is finally over. Chatbots are loaded with value-added capabilities and have become quite adept at directing users to a solution.

This chapter pulls aside the veil that surrounds technologies such as automation, bots, and AI and shows how they can work together to revolutionize how you remove the obstacles to your customer encounters.

Demystifying Bots, Automation, and AI

There may be some Venn diagram that shows the overlapping commonalities between the terms *bots*, *automation*, and *AI*, but at a high level, you can differentiate between them:

>> **Automation** replaces human intervention by performing a task using a set of preprogrammed steps in exactly the same way every time. There may be some logic branches or loops in the process, but the sophistication doesn't rise above the level of following a recipe.

>> A **chatbot** is a computer program designed to respond with conversational or informational replies to verbal or written messages from users. It may or may not use AI. The early chatbots were basically a decision tree behind an icon.

>> **AI** attempts to replicate human reasoning to allow machines to perform tasks traditionally requiring human cognition, such as language understanding, image recognition, and problem-solving. It learns from data and makes decisions without explicit programming.

Chatbots powered by generative AI (GenAI) are an extension of your support team that can be used by both customers and employees. What they bring to the table is the ability to offer support 24/7 and scale engagement beyond the capacity of your human team as demand increases. They can also make product recommendations to increase lead conversion.

Embracing Both/And Instead of Either/Or

The question isn't "Which should I use: automation or AI?" It's "What is the best tool for the job?"

An AI-based chatbot maintains the context of the conversation in its history, which can enable interactions that are more like interactions with a human and can elicit follow-up questions from the customer that point the bot toward better answers.

Then, if the customer wants or needs to escalate the chat to a live agent, the context is preserved, so the agent can pick up where the bot left off, avoiding the need for the customer to repeat info or catch up the agent.

A bot essentially performs triage on the issue, which optimizes the time of the agent. The agent accepts the handoff and moves on to more advanced questions that may be beyond the scope of the bot.

Another use of GenAI-powered chatbots is to summarize complex articles into succinct, ready-to-use responses while retaining a link to the original article as needed, making it easy to share with the customer. The bot has access to the knowledge base, so it can maintain accurate information in bot-assist solutions. It can provide a feedback loop to the knowledge base to flag questions that weren't answered well. A customer or an agent can reformulate the question, or simply flag it with a thumbs-down. Analytics note topics with answers that are suspect or are missing from the knowledge base and need to be updated.

AI-augmented automation is typically easy to deploy, easy to maintain, and improves the accuracy of agent responses. It also increases the rate of containment and enhances self-service resolution.

Omnichannel workflow automation can triage workflows to automate customer interaction and route issues across any channel.

Reaping the Benefits of Integrating AI and Automation

When you combine AI and automation, you take customer engagement to the next level. It's a game changer that can redefine your expectations of your teams and the outcomes they can achieve in multiple areas:

>> **Personalization:** Support and sales databases hold a wealth of information about customer purchase history and

preferences that can be used to refine the customer experience (CX) and increase lifetime value. These interactions can include offering products and services that are highly relevant to their portfolio, prioritizing preferred communication channels when engaging the customer, and adapting to customer preferences based on past engagements.

» **Tactical adaptability:** The market presents an ever-changing landscape that can be difficult to interpret and respond to. AI cuts through the noise to identify nascent trends and then hands off this intelligence to automation to execute on logistics.

» **Strategic planning:** AI detects the tectonic shifts in the economy and forecasts likely scenarios, enabling your organization to remain agile and to bypass the competition in the midst of market chaos.

The contact center is a prime candidate for AI–powered tools because it's the main link between your customers and your brand at scale. This is where you can discover issues in your product and what the competition is offering that you do not.

Here are some capabilities you should look for when choosing a contact center AI solution:

» **Natural language processing (NLP):** AI can use NLP to analyze conversations with customers in real time and reveal trends in the conversations, such as automatically detecting when new topics arise, or whether your competitors are being mentioned more, or if there are more mentions of outages or defects than usual. NLP then processes the conversation data to accurately capture and transcribe it, word-for-word, into an easy-to-read format. In addition, AI can use machine learning to improve its performance over time. This means that the more you use AI to create transcripts, the better it will understand the subtle nuances and unique vocabulary used by your business and industry, and the more accurate it will become when transcribing.

Advanced AI solutions can distinguish between speakers in the transcript, so you always know who said what, which not only is a great time-saver, but also can forestall potentially embarrassing misunderstandings.

» **AI voice analysis:** Supervisors can easily monitor multiple calls at once with the help of AI, which can analyze the sentiment of any current live voice call between agents and callers. A manager who notices a call with negative sentiment can open the transcript to get more context before jumping into the call.

» **Automated call summaries:** When you wrap up a call, AI can gather your transcript, action items, highlights, and any manual notes into an easily digestible call summary, so you can quickly recap important discussion points and follow up with teammates or customers.

» **Speedier quality assurance (QA):** AI can accelerate QA reviews, reduce compliance risks, and improve agent adherence. Instead of supervisors having to review call recordings manually, AI automatically suggests when defined criteria have been met and highlights coaching opportunities.

» **Real-time assist:** Do you have customer support agents or sales reps who may need some on-call coaching? With AI, you can create real-time assist cards with tailored notes and set them to trigger automatically when certain keywords or phrases are spoken on calls. It's coaching at scale and in the moment.

» **Easy on/off toggle:** Want to turn off AI for sensitive conversations that you don't want to record or transcribe? With the right system you can do that with a click from your call screen.

» **Live guidance for sales teams:** With AI, coaches and supervisors can track references to sales methodologies such as budget, authority, need, and time frame (BANT); situation, problem, implication, and need payoff (SPIN); and situation, pain, impact, critical event, and decision (SPICED) more easily. AI can automatically suggest questions and phrases that agents need to say during a call (for example, asking about budget purchase timelines), understand whether the behavior was met, and check the task off the list (or notify managers if this isn't being done).

TIP

A top-tier AI contact center solution will help you understand your people better so you can reduce churn, streamline agent and supervisor workflows, increase productivity, and dramatically improve customer-centric metrics.

A contact center that is powered by AI integration enables a wealth of optimization in the organization, including the following:

» **Native integrations:** You can connect your contact center with your customer relationship management (CRM) or ticketing system, and use AI to deliver further personalization and context and provide a superior CX across every channel.

» **Customer intelligence:** Using AI, your managers can stay on top of agent activity and performance using real-time dashboards, customizable wallboards, and call volume and hold-queue metrics.

» **Customer choice:** Customers can easily interact with your business in any channel they choose, including an AI-powered virtual assistant, solving problems quickly and gaining trust in your brand.

» **Actionable AI:** Look for a system with a toolset that delivers real-time AI-powered suggestions for both agents and supervisors, which will improve standards of service both in real time and in the post-call review.

» **Intelligent coaching:** Contact center service leaders use AI-powered tools to see where problems occur and exactly how to address them. Find the most important coaching opportunities and eliminate lengthy call-review cycles.

» **Seamless knowledge access:** Connect any customer or agent question to the right information across every internal and external knowledge source to deliver answers with a natural language response in real time.

WARNING

AI is revolutionizing business, but most existing solutions face limitations in accessibility, scalability, and accuracy.

Advanced AI implementations offer a cost-effective, scalable, secure, and accurate way to empower businesses with advanced capabilities. Look for a solution designed specifically for automating and enhancing business interactions, and with its power, you can improve your CX, optimize sales strategies, and streamline communication workflows across your organization.

TIP

Here's a short checklist of things to look for in a call center solution:

» **Out-of-box AI:** You don't have time for complex development or model training. Insist on a full-featured solution that's ready to rock right out of the box, minimizing the learning curve and ensuring that your team can utilize all the AI tools from day one.

» **Built for business:** Generic AI solutions that have been trained on massive irrelevant data to your business (such as the entire internet) aren't capable of running at the speed of business. Insist on a business large language model (LLM) solution that has been meticulously trained on billions of business conversations from customer engagements and offers a specialized experience. Whatever your industry, role, or team size, you need a model that adapts to, predicts, and enhances your business processes for optimal outcomes.

» **AI infrastructure at scale:** Advanced GenAI models are engineered for the dynamic needs of today's businesses. They're built on a robust architecture that provides you limitless access to powerful AI capabilities, ensuring you never hit a usage ceiling. They're also designed to adapt and learn as business requirements evolve, ensuring real-time, high-performance results.

» **GenAI accuracy:** Every business conversation is an opportunity for growth. Mature solutions delve into these interactions, pinpointing crucial elements such as action items, the essence of call discussions, and the pulse of customer satisfaction. They don't just listen — they learn, offering actionable insights to elevate every interaction.

» **Privacy and compliance:** Your data is your asset, and with a quality system, your data remains exclusively on the system. Look for stringent compliance to standards, including the Health Insurance Portability and Accountability Act (HIPAA) and System and Organization Controls 2 (SOC 2), especially if you're in a sensitive industry sector. Adhering to global standards like the European Union's General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) is table stakes.

Chapter **5**

Building AI into the Core

The measure of the success of a service experience rests in the mind of the customer. Your agent will certainly have an opinion, but the true metric depends on how the customer perceives the interaction. In fact, it's possible for a customer to score an experience as satisfactory even if the issue isn't totally resolved in the first contact (known as *first contact resolution*) All the steps along the way matter just as much as arriving at the desired destination.

The concept of the customer satisfaction (CSAT) score emerged in 1986 from the efforts of Texas A&M Professor Leonard Berry and his team to measure expectations against perception — specifically, to map the customer's expectation of the outcome against their perception of the actual experience.

This chapter provides tips for using key performance indicators (KPIs) and artificial intelligence (AI)–assisted tools to improve the service you provide for your customers.

Maximizing Customer Satisfaction

Mick Jagger seemed to have problems finding satisfaction, but there is no reason your customers should share his fate. Satis-faction comes down to expectations. To understand the basis of

a customer's level of satisfaction or dissatisfaction, you have to uncover the customer's expectations for each touchpoint in the interaction, determine whether you met those expectations, and, if necessary, discover how you can improve.

The CSAT is measured using customer feedback surveys and is scored as a percentage ranging from 0 to 100. It provides data-based insights into who your customers are, what they care about, and how you can outperform competitors to win their business and loyalty.

CSAT uses qualitative feedback regarding customer perceptions and translates it into a quantitative metric you can use to improve the success of your products and services.

CSAT scores can identify the touchpoints in customer service, sales cycles, and product functionality that are actually pain points for the customer, and help you discover how to resolve them for future customer interactions. You can even use CSAT on internal processes, such as onboarding.

REMEMBER

Improving CSAT can increase brand loyalty, customer success, and customer lifetime value.

You can use CSAT scores to:

>> **Differentiate yourself from the competition:** Your CSAT score assures customers that your dedication to customer experience (CX) extends beyond the sale.

>> **Reduce churn:** Standard business metrics such as customer lifetime value, acquisition cost, retention rate, churn rate, and conversion rate are bulk measures that aren't tied to specific customers and their experiences. CSAT scores let you dial in on customers who are likely to churn while you still have time to do something about it.

REMEMBER

When you're looking for a contact center solution, keep your CSAT score in mind. Legacy solutions capture and grade only a fraction of customer interactions, but AI-based CSAT tools can rate 100 percent of the calls at a granular level down to teams or even an individual agent, retaining all the nuances of the conversation. Low-scoring agents can get remedial training, and supervisors can monitor their satisfaction score to verify that it increases over time.

TIP

Look for solutions that can:

>> Streamline the task of creating an engaging CX on every channel.

>> Have AI listen to each call and analyze keywords and phrases to give your support team a complete picture of CSAT.

>> Accurately measure customer sentiment and predict CSAT scores from the transcript of customer interactions.

>> Support built-in dashboards that allow contact center managers to track AI CSAT predictions over time and drill into AI-predicted scores and customer survey responses.

>> Sort individual CSAT scores per agent to identify the agents who need coaching.

>> Automatically create call summaries so you can drill deeper into agent performance-review recordings, search transcripts, track interesting moments, leave detailed notes, and save calls to coaching playlists.

The bottom line is that you need to be able to bring all your support conversations into one AI-powered app so your team can provide the best customer service on every channel.

Analyzing and Scoring Every Call

W. Edwards Deming was onto something when he said, "If you can't measure it, you can't manage it." But when it comes to customer service calls, trying to measure the quality of an interaction can seem like trying to nail jelly to a donut.

A customer service scorecard is a list of tasks or behaviors that outline what a contact center agent does to provide a high level of customer service.

Customer service scorecards are a powerful tool to help contact center leaders track and measure agent performance. By tracking key customer service metrics, such as CSAT, average call handle time, and resolution rate, scorecards can make it easier for you to quickly identify areas of excellence versus areas that need improvement.

Scorecards also give you a way to compare agent performance across multiple departments or teams, empowering your supervisors to identify trends and patterns in agent behavior. They can then coach your agents to be better equipped to address particular issues or problems customers may be having with their products or services.

TIP

Create customer service scorecards at both the agent and team level to measure overall performance, identify top performers and areas needing additional support, and monitor trends impacting your customers' experience.

There are three steps to building a customer service scorecard:

1. **Determine your goal.**

   The primary goal of your contact center may be to drive a positive CX that promotes CSAT and fosters long-term relationships.

2. **Identify which KPIs will support those goals.**

   CSAT is likely the most important KPI for customer service, because it directly reflects the customer's level of satisfaction with the support team.

TIP

3. **Reverse-engineer your actions and outcomes.**

   By taking into consideration the supporting actions and outcomes, you can work toward achieving those KPIs and, consequently, your primary goal.

Some metrics are dependent on the channel that you're measuring. It's not enough to say, "We will provide quick responses to customers." You must set goals for response time per channel. For example, for live channels (live chat), measure average speed to answer (ASA); for non-live channels (email), measure average first response time (FRT).

REMEMBER

Not every measurement has to be quantitative — there is a place for qualitative measurements as well. For example, you may want to verify that agents are friendly and knowledgeable. How can you measure that?

Develop a strategy to measure agent tone, empathy, product knowledge, consistency, and adherence to processes. Use the scorecard to evaluate agent performance against these requirements — such as

whether the agent greeted the customer and asked how their day was going — and provide feedback for improvement.

This effort can be challenging in a large contact center or if your supervisors are overseeing big teams, but AI–powered quality assurance (QA) scorecards automate scoring and analysis, which enables more consistent and focused agent coaching.

TIP

Your customer service scorecard should include a few key elements:

>> **Your required tasks:** These are the actions or behaviors that agents must execute during every interaction with customers. For example, did the agent greet the customer at the beginning of the conversation, follow proper trouble-shooting procedures, provide fast responses, provide consistent follow-up, and provide a quick resolution?

>> **Your KPIs:** These are the metrics that you use to measure success against this set of behaviors. For example, CSAT scores, QA scores, ASA, service-level objective (SLO), and mean time to resolve (MTTR) are just a few of the possible KPIs you can use to hone the effectiveness of your team.

>> **Your targets for those KPIs:** Define your targets for each KPI and use industry benchmarks, if available, to verify that you and your team know what "good" looks like.

TIP

KPIs to include in your customer service scorecard include the following:

>> **CSAT:** Unfortunately, in most cases, only the angriest and happiest customers take the time to provide feedback. Everyone else ignores the survey, skewing your results. AI-powered CSAT solutions can infer CSAT from conversations.

>> **First contact resolution percentage and MTTR:** Assess how well your contact center efficiently resolves customer interactions.

>> **SLOs:** Measure how consistently your agents follow up with targets for initial response and follow-up frequency.

>> **QA score:** Measure whether your agents successfully execute the QA tasks as laid out in the scorecard.

>> **ASA for voice and chat:** ASA reveals, on average, how quickly agents get to customers on different channels.

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Increasing the World Happiness Index

Yes, there is a World Happiness Index. It comes from the World Happiness Report, which is a partnership of Gallup, the Wellbeing Research Centre at Oxford University, the United Nations Sustainable Development Solutions Network, and the World Happiness Report Editorial Board.

The report reflects a worldwide demand for more attention to happiness and well-being as criteria for government policy. It reviews the state of happiness in the world today and shows how the science of happiness explains personal and national variations in happiness.

In case you're wondering, the top three slots for 2024 go to Finland, Denmark, and Iceland.

But here's the thing: There's no reason you can't add to the World Happiness Index by brightening the corner where you are and increasing the happiness index of your customers. And the best place to start is in your communications system.

WARNING

Some of the most valuable customer service information in an organization is often overlooked. It's the vast store of knowledge trapped in call recordings and meeting recordings.

Most organizations have never even considered the possibility of tapping the wealth of customer insight that lies fallow in their contact centers because of the difficulty of harvesting it.

The problem with recordings is that they can't be skimmed. You have to listen to them in real time or, in a best-case scenario, at up to 2x speed. That's why you need an AI-powered call recap or call summary capability.

AI-powered recaps provide easily digestible, consistent, highly accurate summary notes on every call or meeting without you or an agent having to do a thing. Recaps can be stored in the customer relationship management (CRM) system and referenced during the next call.

The power of recaps lies in the expectations of the customer.

REMEMBER

To understand the basis of a customer's level of satisfaction or dissatisfaction, you have to uncover the customer's expectations for each touchpoint in the interaction.

By reviewing prior conversations, your agents can personalize each interaction with your customers and make them feel recognized, more than just another call among many.

In addition, recaps allow teams to quickly glance at summarized points, ensuring that they're always on top of their tasks. They can find what they need in 30 seconds as opposed to listening to a ten-minute call.

Use recap to:

» Deliver recaps of meetings to your inbox.

» Effortlessly request and share summaries for any call or meeting.

» Tailor the recap format to match team preferences — short, medium, long, or bulleted summaries.

» Automatically schedule meetings mentioned in the recording using extracted date and time information.

» As a manager, review summaries of customer calls, accelerate issue identification, track resolution progress, and strategize improvements.

Common uses for call recap include:

» **Remote team collaboration:** Managers can ensure that remote teams across different time zones have access to shared meeting and customer call insights, fostering unity and consistency. If you use a single app for communications, then the same benefits apply to all your employees, such as for meetings.

» **Project management meetings:** Project managers can swiftly review decisions and action items from meetings, aiding in clear communication and milestone achievement.

» **Sales team debriefs:** Sales teams receive succinct summaries of client calls, emphasizing crucial points and actions, thereby accelerating follow-up on opportunities.

>> **Executive briefings:** Executives can stay updated on important meeting outcomes, ensuring that they're always in the loop, even if they can't attend.

>> **Training and onboarding:** Trainers can condense call sessions into easily digestible summaries, helping new employees quickly get up to speed.

IN THIS CHAPTER

» **Being where the customers prefer, giving them the option to do it themselves, and listening to them when they're unhappy**

» **Having your agents' back and empowering them to succeed**

» **Tracking metrics and doing A/B testing**

» **Figuring out where things are breaking and fixing them**

Chapter **6**

Ten (or So) Ways to Take It to the Next Level

H ere are ten (or so) ways to maximize the impact of your contact center and keep it running on the rails:

» **Be on the channels that your audience is on.** To optimize your call center operations and turn them into contact center operations, equip your team with the tools to provide multichannel or omnichannel service and support. Your customers or prospects are on all kinds of devices, and ideally, you should be meeting them where they are.

» **Implement self-service tools powered by generative artificial intelligence (GenAI) to enhance customer support and streamline contact center operations.** GenAI makes information easy to access, enabling customers to troubleshoot issues independently. This reduces the number of incoming calls, freeing your agents to focus on more complex tasks and ultimately improving the overall customer experience.

» **Always offer an escalation to live agents.** Too often, businesses are lured by the power of automation and tempted to overdo it. The best bots and self-service tools are the ones that are smart enough to understand when they can't help your customers and will bring a live agent into the conversation. The conversation can continue without interruption and without requiring the customer to repeat themselves.

» **Welcome customer feedback.** You can collect feedback through phone, email, social media surveys, or AI-automated surveys like AI customer satisfaction (CSAT), which can be deployed on 100 percent of calls. These automated surveys provide real-time insights into customer satisfaction, allowing you to capture feedback from every interaction. When customers have negative experiences or churn, this feedback helps you quickly identify issues and implement solutions to improve future interactions.

» **Have a good agent onboarding plan.** This is a highly important asset for contact center management. Comprehensive materials and engaging agent training will prepare your new hires and save you follow-up training down the road. This is where GenAI assistants, based on large language models (LLMs), will smooth out the speed bumps to streamline agent onboarding.

» **Train and coach agents at scale.** Use live sentiment analysis to monitor active calls and click on problem calls in real time to see the running transcript and decide when to jump in.

» **Leverage real-time assist (RTA) cards.** Create RTA cards with notes to help your agents address common problem topics and set them to pop up whenever certain keywords are spoken.

» **Do A/B tests.** A/B tests are especially important for new scripts and processes. When you introduce new call scripts, playbooks, or processes into your workflow, the best way to make sure they're working is to do A/B tests. Take two alternatives — say, two different playbooks — and compare them through testing to see which performs better with customers.

>> **Coach your agents.** Leverage AI tools to grade and score your agents on a scale based on your business objectives and processes. This practice will bring consistency and cultivate a single culture within your organization.

REMEMBER

Measuring everyone with the same tools is fairer than measuring only a subset once in a while. Agents want to perform well — they just need the proper coaching to improve.

>> **Define mission-critical key performance indicators (KPIs) and stick to them.** Start with the net promoter score (NPS) and set ranges: 0 to 6 for *detractors* (unhappy customers who've had a negative experience), 7 to 8 for *passives* (satisfied but unenthusiastic customers), and 9 to 10 for *promoters* (loyal customers who will keep buying and recommend you to others). Add the CSAT score next.

>> **Define business outcome KPIs.** Identify the most crucial business outcome you want your team to drive, such as reducing churn, increasing CSAT, or increasing upsell or cross-sell. Empower your agents to advance that outcome and align their goals with your business goals at a department or company level. Then provide them with the right tools to make them successful, such as AI CSAT to capture and track CSAT on every call over time, and measure trends, AI playbooks to help them be more performant selling, and AI agent assist to help them answer harder questions better.

>> **Create a root-cause analysis team.** This is especially valuable if you're dealing with lots of escalations. This team can take data — like a low NPS or CSAT score — and drill down to find the root cause of dissatisfaction.
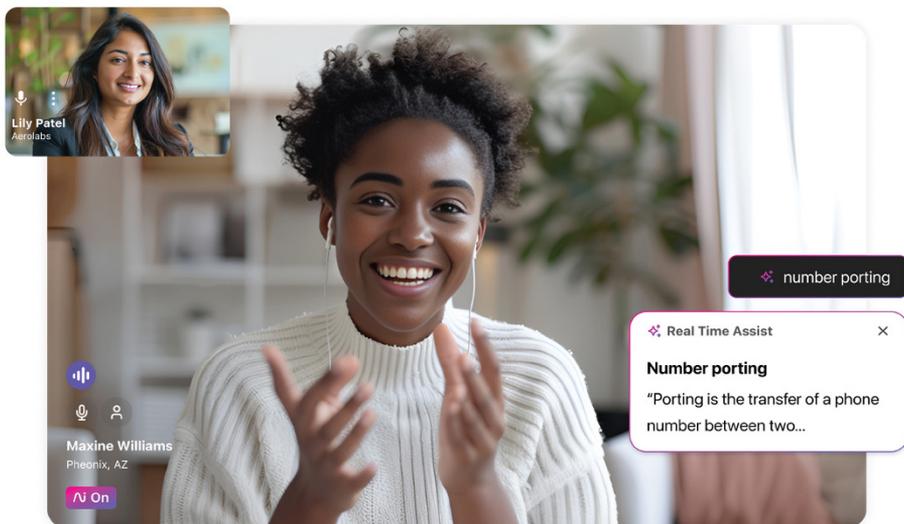
Maximize innovation and customer satisfaction

Does your contact center add value to your bottom line? It should, and it can! AI-based contact centers handle more than twice the number of calls of a traditional contact center. In this book, you learn how finely crafted policies and operational guidelines, supported by twenty-first-century infrastructure, can improve customer satisfaction and be a gateway for innovation that will revolutionize how your customers interact with your company.

Inside…

- Launching cloud-based contact centers
- Building AI-based self-service options
- Improving agent performance with KPIs
- Leveraging real-time assist cards
- Training and coaching agents at scale
- Establishing an agent onboarding plan
- Being where your audience hangs out

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