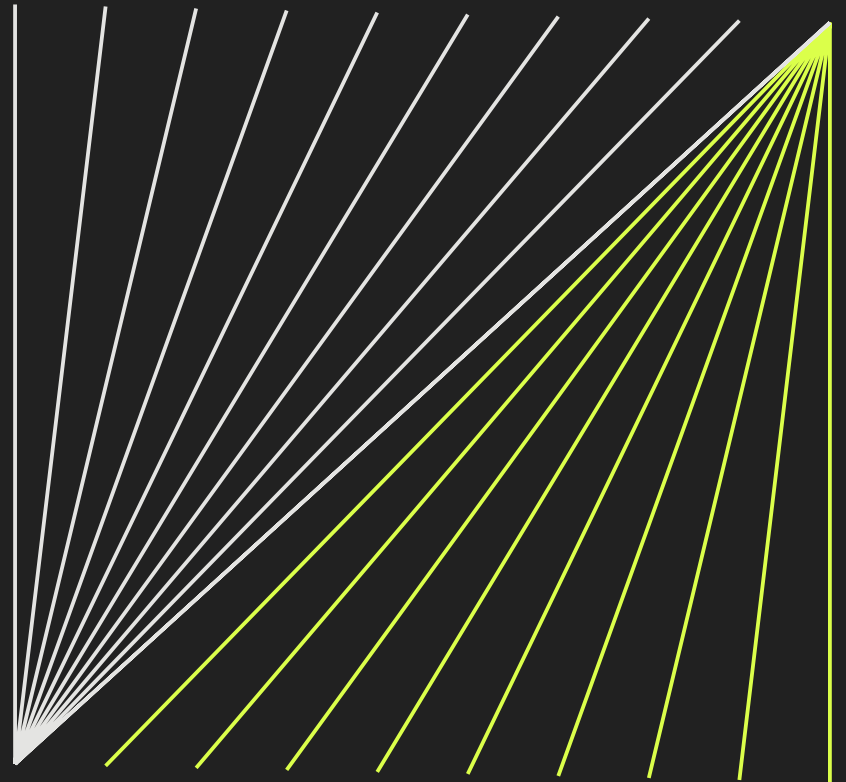


The Modern CX Guide to Summaries



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Good summaries are essential to a well-run, ever-improving CX organization, but good summaries are also few and far between.

Good summaries at scale deliver a wealth of value to your business, including:

- Crucial historical context to help agents and make customers feel known
- Necessary compliance data
- Some of the most valuable customer and business data you can harvest
- A true reflection of agent performance
- Insights into what is (or isn't) driving customer satisfaction

Unfortunately, you are likely not getting all your business needs from them. Worse yet, they distract your agents from customer conversations and add crucial time to your AHT.

It does not have to be this way. You need to know what your conversations are about, and we will help you get there.

This eBook will cover the best practices and technologies that will deliver the value that good summaries promise without undue agent distraction. Readers will learn:

- What good summaries look like, and contain.
- Best practices for summarization.
- How new technologies, like generative AI, can both reduce the need for manual entry and enrich summaries with all necessary key details.
- What to look for when evaluating summarization technologies.
- How to ensure you are collecting valuable business insights from your summarization efforts.



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The Value of Good Summaries

The ability to create and collect accurate, data-rich, and easily accessible summaries at scale is a game-changer for a modern CX organization.

Summarization done right will empower your agents, delight your customers, and give you a clearer picture of what is really driving the successes and areas for improvement in your organization. Let's dive into the true value quality summaries.



Customer delight

Customers want to feel known and seen, and agents need background information to approach the interaction appropriately and more quickly get to where they can help the customer. Satisfying both sides of this coin depends on accurate, readily available context, which happens to be what summaries provide.

With good summaries:

- Customers will be greeted and helped with the appropriate recognition of their past interactions and issues.
- Time will not be wasted repeating information that has already been covered.
- Agents, armed with context, will not have to dive into as many unknowns and they will be able to help the customer more quickly.

As a result, good summaries will lead to better interactions and more satisfied customers.

Agent happiness and effectiveness

Much like your customers, your agents are going to benefit greatly from good summaries. Agents, tasked with solving issues while assuaging sometimes angry customers, have a hard, dynamic, and demanding job. This job can be made even harder if agents are going into their interactions blind, with no clue as to whether that customer already has a lengthy history with your company.

With good summaries:

- Your agents will know exactly what issues each customer has had before, if they have been solved, and what steps went into solving them.
- Knowing this, they can adjust their tactics and their soft skills accordingly to meet the customer where they are to more easily diffuse difficult situations and more quickly solve their problems.

As a result, good summaries will make your agents more effective, more efficient, and probably quite a bit happier.



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Incredibly valuable business data

Understanding what your customers are contacting you about, how they are feeling, and if you have been able to solve their issues is one of the most important indicators of the health of your business.

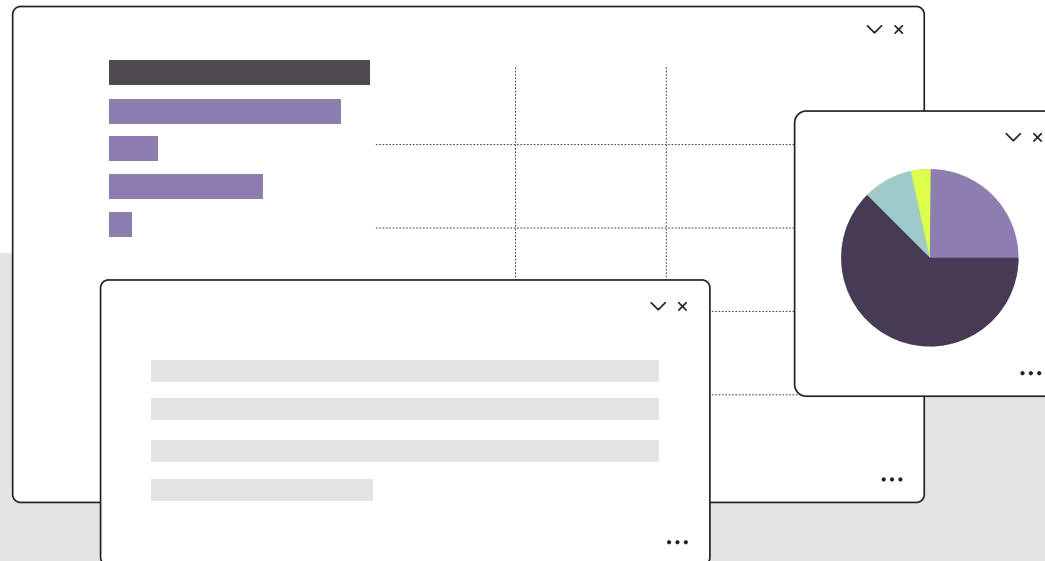
There is a treasure trove of information either hiding in your unharnessed data swamp or escaping into the atmosphere as mere carbon dioxide. Imagine if you had all of that information at your fingertips to identify and inform KPIs such as:

- Which and how many interactions are tied to specific problem categories?
- How often are sales, cross-sells, and upsells brought up? How effectively are they brought up? How successful are these efforts?

- Searchable agent strengths and weaknesses for coaching and improved performance.
- Customer sentiment analysis across all interactions tied to causality.
- The ability to track data and indicators tied to high-level initiatives and issues like product launches, selling campaigns, high-level issues, etc.
- High-level views of agent effectiveness that you can drill down into well beyond CSAT, AHT, and survey results.

Additionally, depending on your business, summaries may be necessary if you need them for reasons like compliance.

In short, good summaries drive increased customer satisfaction, agent effectiveness, agent efficiency and surface valuable business data.



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Where is the friction?

Good summaries for every interaction can deliver massive business value. However, if you were to poll CX leaders on their summarization efforts' usefulness, exhaustiveness, and accuracy, you would find that current reality to be sorely disappointing. So why does everyone have such bad summaries?

The answer? The summaries that your business truly needs have been impossible to achieve at the speed, accuracy, and scale demanded by modern contact centers using the previous generation of technology.

To arrive at an ideal world of summaries, we must first understand what is holding us back.

Let's look into the various factors that have set the stage for the current state of summarization affairs.



Here are a few of the host of factors standing in the way of good summaries at scale:

- **Manual**

Agents have been tasked with filling out free text and structured summaries during and immediately after their calls. This distracts agents from their true purpose - helping the customer. As a result, the agent, the customer, and the summary all suffer.

The manual nature of summaries will also result in inherently unpredictable or inconsistent quality, which erodes their usefulness. The context and the data they provide will be fragmented and incomplete.

- **Rushed**

Your agents are judged on many metrics, many of which prod them along at an efficient pace. With aggressive AHT goals to meet, agents are often rushing to the next call. Those performance goals come into direct contrast with summaries

presenting agents with a dilemma - do they give the summaries the time they deserve, or do they do the minimum to keep moving forward? At the end of the day, you may find that your agents are essentially incentivized to write low-quality summaries or skip the dispositioning process altogether.

We've found that the time required to create these summaries is, on average, 10% of the actual interaction duration. For agents looking to cut their time, the place to do it is pretty clear.

- **Over-reliance on surveys**

You may wish to address your data needs with surveys. We caution you on this as surveys often don't deliver an accurate picture due to low response rates and the fact that you tend to hear only from your most opinionated customers - especially if you allow your agents to determine whether or not to solicit a survey following their interaction.

Survey-based systems can no longer meet the demands of today's companies



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• Hurting your Calls

A distracted agent is an ineffective agent. As we mentioned earlier, summaries are, unfortunately, an agent distraction. Just when are you supposed to take your notes?

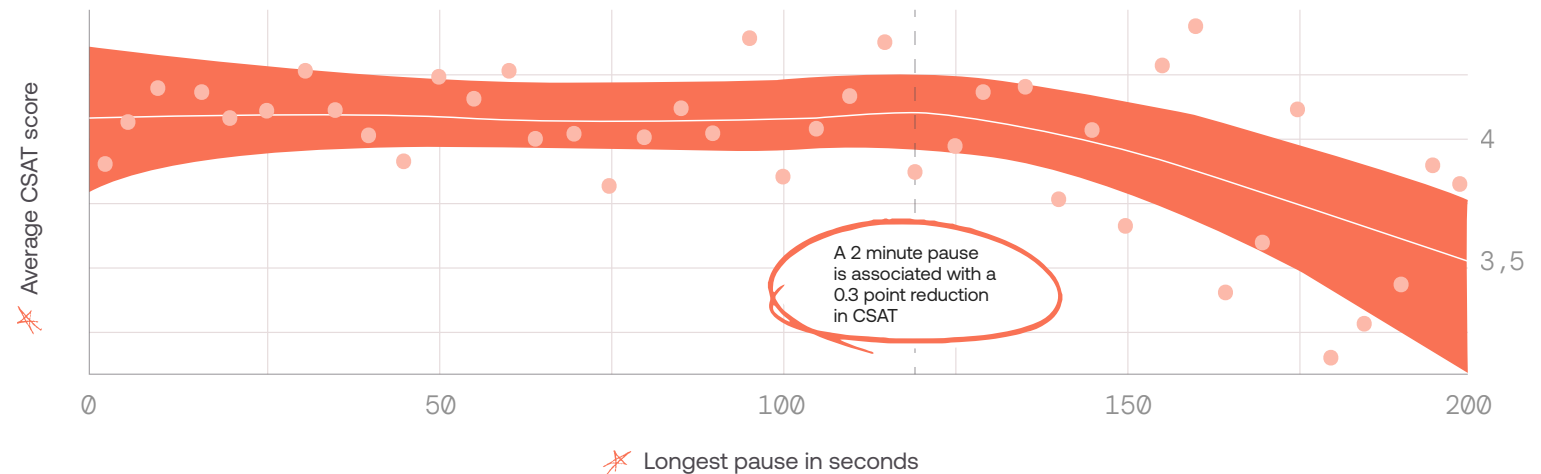
Waiting for natural pauses is a common best practice, but we have found that this doesn't really happen. In a [previous study](#), we estimated that half of calls have less than one pause every two minutes, and 13% of the calls have no pauses at all. Moreover, for most of those pauses, agents are busy actively working on the issue (looking for information, filling forms, etc.), so taking notes is not a possibility. Without an abundance of natural pauses, agents are forced to break up the natural flow of conversation, adding additional friction to each call.

What does this do? Ultimately, this friction will likely have negative consequences for your CSAT score as we have found that more and longer pauses relate to a lower CSAT score and a longer overall call.

• Frustrating for Agents

We've discussed how the status quo for summaries is manual, rushed, and frictionous. No one feels these negative pressures more than the agents handling the day-to-day responsibilities. Agents constantly deal with difficult situations, and summaries are an additional shadow hanging over their heads, extending their AHT on every call.

Agent attrition is one of the highest rates of any profession. With [average estimates](#) ranging between 30-40% per year and with some centers seeing over 100% attrition, anything that can remove distractions and burdens from agents is a welcome tool for maintaining their workforce.



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- **Inconsistent Quality**

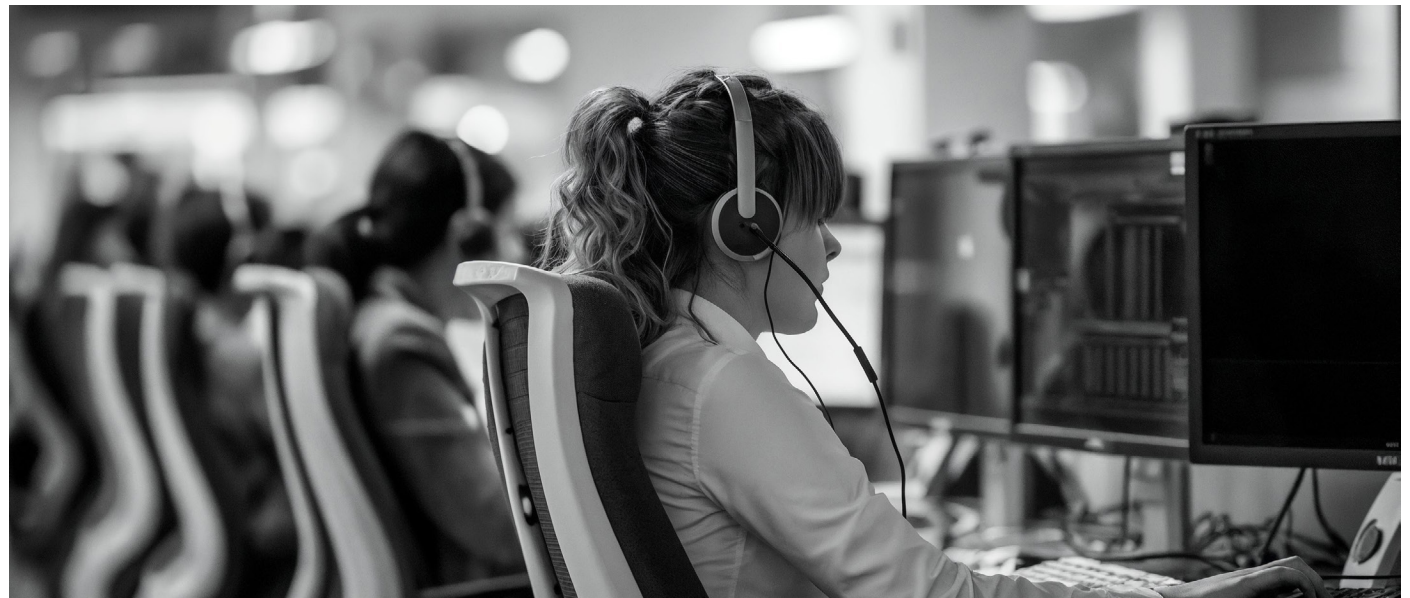
What happens when you have hundreds to thousands of individuals who all feel rushed and are tasked with recording and submitting valuable information? You will likely be left with many unusable summaries and unreliable data. When you have that at scale, you have a problem.

- **Under-Reporting**

Good summaries must accurately depict what has happened on every call - the good and, perhaps more importantly, the bad. Depending on all of your agents to reflect both the good and the bad on every call is a tall ask. Relying on manual summarizations can cover key performance indicators critical for an organization to be aware of and act on.

- **Multi-Channel Communications**

Customers are likely contacting you on multiple channels like voice, social media, chat, and maybe SMS. Ideally, the summaries from all interactions on various channels can be recorded and connected with the right customers and issues and then served up to the next agent interacting with that customer on whichever channel the next interaction takes place. Easier said than done with old-school summary solutions.



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What does this friction look like?

According to our research, an average call center
may be staring down the barrel at these bleak stats
regarding summaries:

120-300

seconds spent
dispositioning
per call.

Less than

25%

of notes that
are actually of a
useable quality.

No data

to aggregate for
key business
insights.



How does your business suffer from this friction?

- Agent frustration and distraction
- Lack of context for interactions
- Lower CSAT scores
- Higher AHT and too much after-call wrap (ACW)
- Missing key performance data

Your CSAT, AHT, upsells, etc, is board-level data. It reflects the effectiveness of your CX organization. It also contains vital indicators of your business's overall health and performance. But this board-level data shows you how things are at a high level, not the why or the specific what.

Summaries can provide a clear look into the why and the what that is driving your board-level data. Good summaries can show clearly:

- Why are your customers contacting you?
- How effective are individual agents, and what is being done well and poorly?
- How often selling is introduced, how, and is it working?
- And more...

Beyond the valuable data mentioned already, savvy leaders can now connect that data and corresponding KPIs more clearly to revenue-generating elements of the business to open up more resources to make the investments that their organization needs. If you don't have a clear picture of why your customers are calling and how well you are helping them, then how are you going to address any needs in your CX organization?

Without good summaries, you are flying blind.

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What Is An Ideal Summary World?

- Summaries made for each interaction.
- Summaries that are in line with best practices filled with information that matters.
- Summaries are easy and quick to do (or ideally fully automated) and do not get in the way of conversations or the agent's workflow.
- Summary product tooling that lets you apply those questions to historical interactions (in case you don't know what you need to look for in advance).
- Summaries that extract key business insights and surface them in a usable and digestible way to all who need them.
- Truthful summaries show the good and bad, so you know what is working and what isn't and where you need to improve.
- Summaries completed immediately after the call, in case the customer calls back and another agent needs context.
- In short, you want accurate summaries, with the right information, with instant availability, that don't distract agents, and don't increase AHT.



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The Tradeoff

Your business needs good summarizations. So much depends on it.

However, getting good summarizations from humans at scale and speed, who themselves are meant to focus on a much more demanding task – helping the customer – is a tall ask and will likely not bear out. So, the choice that you have been presented with is as follows:

- How much summarization work do you want to task your agents with?
- How much time do you want to allow them to spend on this?
- How many resources are you going to dedicate to policing these summaries for quality and accuracy?
- How much technological infrastructure are you willing to build to harvest the data you are collecting and put it into the hands and systems that need to use it?

It's a tough call because these are expensive questions. It makes sense why summaries are broken as CX leaders have been faced with a tradeoff between cost and the quality of your summaries.

Luckily, this tradeoff is now a choice because modern Generative AI summarization solutions can deliver accurate, exhaustive, readable, and data-rich summaries at scale better than any human or previous solution.



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Where to Start?

As mentioned, your ideal world with summaries is to implement a best-in-class generative AI solution. We want to help get you there, but first, let's address a few high-level best practices that you can implement today. Remember that you are dealing with a lot of existing friction, so having a lean process is critical.

- Tailor the questions that you want to ask around what is important. As a guideline, remember the 3 R's (retention, related sales, and referrals) and make sure that you are only tracking what is essential.
- If the main purpose of your summary efforts is to satisfy legal requirements, like compliance, then you may need to tailor your summaries to extract only what is required to meet those requirements.
- Optimize for humans. Make the questions clear and easy to answer.
- Designate a resource that can monitor these summaries at altitude and extract key learnings.

This will be difficult, and the tradeoffs within these parameters will vary according to your business realities. Humans are no longer as good at this as Generative AI, and the value that modern summarization solutions can offer goes well beyond what you would get by doing the above perfectly.

To get the full value out of your summaries and to eliminate the friction of collecting, using, and analyzing them, it is in your best interest to implement a generative AI solution.



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Why Buy, and What To Look For

The steps outlined in the previous section may deliver some of the value you seek. However, since you will still be bound by many of the friction points discussed earlier, so much value will still be left on the table.

The only way to truly negate that friction, break the tradeoff, and realize the real value of modern summaries is to implement a modern summarization solution.

For the first time, AI solutions exist that can accurately and automatically summarize all conversations at scale and structure the data in useable, insight-rich ways. That has never been possible before, and that is why now is the right time to find the right solution for you.



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Let's take a look at the landscape for CX summary solutions.

Generative AI capabilities have arrived, and summaries are a prime use case.

Every industry is trying to understand the value, the changes, and the potential dangers that AI is going to bring, and CX is no different. AI will certainly drive a lot of change and tremendous value, but the conversations around it often are too focused on the disruption that it may introduce rather than the concrete use cases and business value that you can realize today.

In short, the future is here, and summaries are a perfect place to begin realizing real value. Here's why.

Why is an AI solution particularly good for summaries?

Summaries are hard to get right for rushed, already-distracted agents. They have enough to balance while actually helping the customer, and it takes time and a different mindset to formulate a comprehensive yet easily digestible summary that is also data-rich with reportable data.

The best AI summary solutions are fantastic at this very thing, and they can do it automatically. They can listen in to your conversations, understand what they are about, what has happened, and how it has been resolved, and map that information to the formats that will be most useful to your agents and to your business.



The result?

Automatic, Excellent Summaries at Scale	Unburdened Agents	Consistent Quality and Dependable Data
---	-------------------	--

What business value do you get?

Reduction in AHT	Happier Agents and Customers	Business Insights
Because now your agents don't have to manually fill out summaries.	Because agents can fully focus on helping the customer, and are armed with more context.	Because now you are capturing key data for every conversation that you know is true.

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Why Summaries are the Best Place to Start with AI

We have answered why an AI solution is worthwhile; now is the time to discuss why this project should be an immediate focus.

An AI summary solution delivers:

Big benefits	Quickly	A Foundation of Intelligence for your AI Journey
<ul style="list-style-type: none">Reduces AHTIncreases customer satisfactionEmpowers agentsSurfaces key business dataInfinite scalabilityImproves the quality of your summaries	<ul style="list-style-type: none">Can be implemented quickly with a simple integrationAlmost turn-keyCan stand alone as a point solution, if needed.	<ul style="list-style-type: none">The right solution can structure your data, serving as a solid foundation for the other solutions which will rely upon it.The insights gained can also form the blueprint for which areas, issues, or value-drivers you want to address as you build your AI solution strategy.

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Not all AI summarization solutions are the same, and while most will be useful, it is important to make sure that you find the right solution to not only address your specific needs but will also serve as a solid foundation and a flexible implementation as you continue your AI journey.

This section will cover the various capabilities, features, fundamental components, and abilities that you should consider when evaluating AI summarization solutions.



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Generative vs. Extractive AI vs. Manual

The first thing you may come across when evaluating AI solutions is the question of whether the vendor in question utilizes generative or extractive AI to power their summarizations. While conventional thinking may view extractive AI as a perfect engine for a summarization tool, generative AI-powered solutions can actually offer greater flexibility and quality.



Status Quo	Better	Best
Manual	Extractive AI	Generative AI
<ul style="list-style-type: none">- Distracts agents- Add to AHT and ACW- Inconsistent quality- Lack of data	<ul style="list-style-type: none">+ Cuts AHT and distractions.+ More consistent+ More data- Brittle - you must be very specific on what you are looking for and how you want it to be structured in advance- Mediocre quality- Data could be more useable	<ul style="list-style-type: none">+ Cuts AHT and distractions+ Consistent+ On par or better with the highest quality human summaries+ Can generate aggregated and structured data for deep analysis+ Able to apply new structured data needs to past conversations as well.

CCaaS vs. Point Solution vs. DIY

There are many types of vendors offering summarization solutions, and you may also have a desire to build out your own. This is a personal choice, but here are a few things to keep in mind.

- Have a firm understanding of what you ideally want your CX stack to look like, and make sure that that construction will allow you to achieve your goals.
 - Some large CCaaS vendors are all-or-nothing solutions that will chain you to their way of doing things and you may be stuck solely in their environment and their processes.
 - Smaller AI point solution vendors may be too small for enterprise and lack additional summary features like dashboards and enrichment. With them, there is no path to further AI maturity if lacking a full product suite.
 - Small CCaaS vendors are most likely still on extractive or ML models for summaries. You will find them typically higher priced and less interoperable, all-or-nothing offerings that may not be able to support enterprise requirements.
- **Key:** Be sure you can **find a partner** to not only solve what you need now but also grow with you and connect to other solutions that you need. Also, feel out that partner and make sure that they are willing to tie into your strategic objectives. After all, you are getting their product to better meet your objectives.
- With DIY, you can likely build reasonable free text summaries. Still, it is quite a bit more challenging than it appears on the surface - NLU, saliency models, intent models, redaction and PII protection, etc. await you. There will be a long lead time if you need a solution now and do not underestimate maintenance and the future addition of necessary innovations once you do have it up and running. Plus, your team is unlikely to also build enrichment, dashboards, and other features that you can enjoy in a leader solution already on the market.
- **Ask yourself:** Has that vendor always been developing with AI in mind, and do they have their own models? Some more traditional vendors joined the AI party late, bolted their AI on, and customers are finding that it does not work smoothly with the core products that they are using.



Key Abilities to look out for

- **Dashboards and data connections.**

All of the great data you are harvesting is only useful if the people who need to consume it and gain insights from it are able to. Make sure you can get some out-of-the-box in-product dashboards for common CX insights as well as the ability to connect your aggregated data to other BI tools like Tableau or Power BI.

- **How flexible is the model, and is it improving over time?**

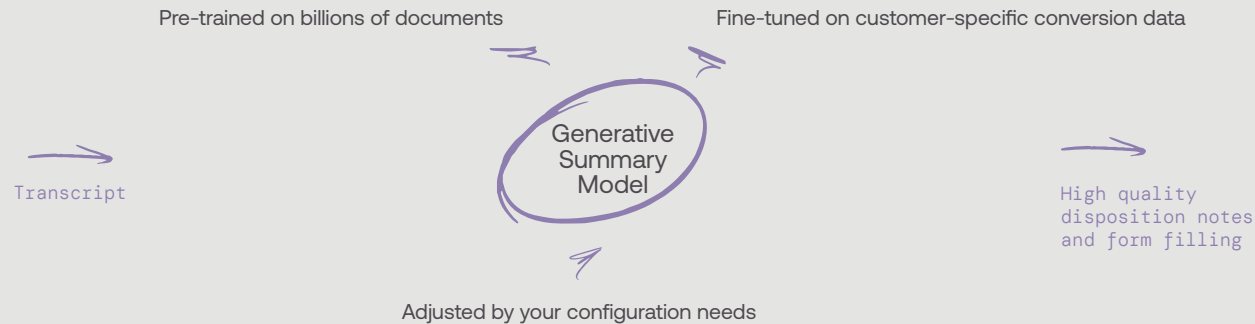
Ideally the solution you select will improve over time to better serve the unique nuances and needs of your company. Also, it will ideally allow you to adjust your parameters and your lens to find new insights or answer new questions from future conversations and past ones.

- **Make sure it will be human-readable.**

AI isn't perfect, but there are solution capabilities to make AI as accurate and dependable as possible. When evaluating solutions, look for some of the following capabilities:

- Saliency models (to filter out unnecessary words or utterances)
- Hallucination detection
- Missing elements restoration
- Redaction
- Layers of resiliency

AI model generates highly accurate summaries and continually learns



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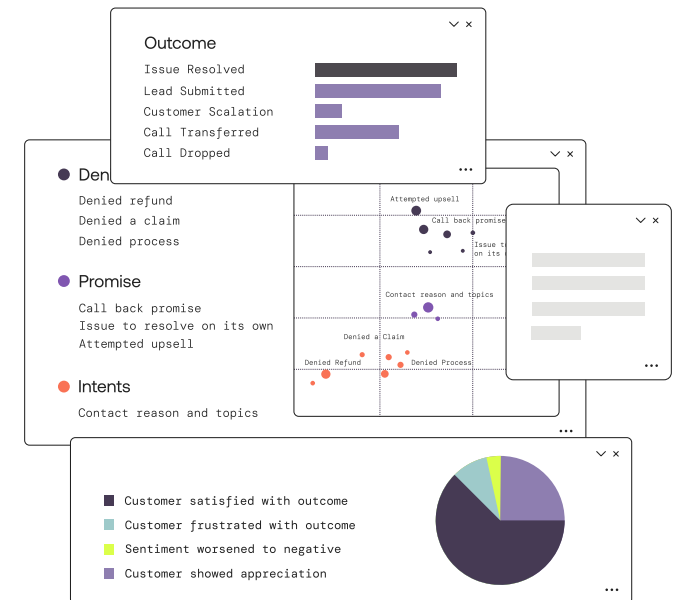
- **Robust structured data capabilities**

To maximize the value of your investment, look for structured data that allows for an easy configuration of what metrics customers would like extracted and allows you to do that from day one.

Beyond the data itself, the solution should also be able to **enrich the data available to technical leaders**. This opens up a world where structured summaries generated become a rich source of insight into customer interactions. Technical leaders will have the valuable data to inform crucial decisions, from ensuring compliance to shaping strategic initiatives like service optimizations and new product introductions.

- **Multiple contact reasons**

Not every interaction is about a single issue. Your summarization solution should be able to support this so you can track the individual issues being addressed in a single interaction or over the lifetime of that customer.



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There is one key capability to have in place that will be necessary to drive good summaries and most other technology solutions that you are looking to implement – good transcription.

While we aren't going to dive too deeply into the reasons for a transcription solution, know that it is table stakes. The good news is that you can most likely bundle your transcription with your summary implementation.



However, you should know that not all transcription solutions are capable of delivering the foundation that you need to build out not only good summaries, but the rest of your CX technology stack. For the remainder of this chapter, we are going to cover what capabilities you will need to have in your transcription solution.

Transcription needs

As you evaluate either your existing transcription solution or begin your search for a new one, keep the following key capabilities in mind:

- **High accuracy**
Most transcriptions get the easy stuff right and can capture over 80% of single words and phrases, but what is left over is the most complex and critical information. Make sure your transcription solution can track not only exactly what was said but also who said it.

- **Low-latency**

Transcriptions can help both during and after the call. From your agents being able to see exactly what was said as it's being said, thus clearing up confusion or accounting for different accents, to being able to use that real-time data in other AI solutions like agent augmentation tools, low-latency transcription is essential.

- **Customization capabilities**

Every business is different, and needs can change over time. Make sure your solution allows for the customization that you will need now and in the future. Transcription is the foundation of much of your CX technology stack, so you are going to need a solution that won't need to be replaced.

You may have a data swamp of all of your past interactions. A modern transcription + summarization solution will turn that data swamp into an asset, delivering all of the value we have covered in this eBook.

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ASAPP AutoSummary and AutoTranscribe

If you made it this far, thank you. Hopefully, you have learned a few helpful things, and ideally, you are interested in getting serious about summarizations. We had a couple of purposes in mind while writing this eBook. First, we wanted to show just how valuable good summaries could be to a business. Second, we wanted to highlight the friction holding you back from that value. Third, we wanted to show a clear path forward. Finally, and this brings us to our final chapter, we wanted to show you what we are all about here at ASAPP and why our solutions are the best fit for you.



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Who is ASAPP?

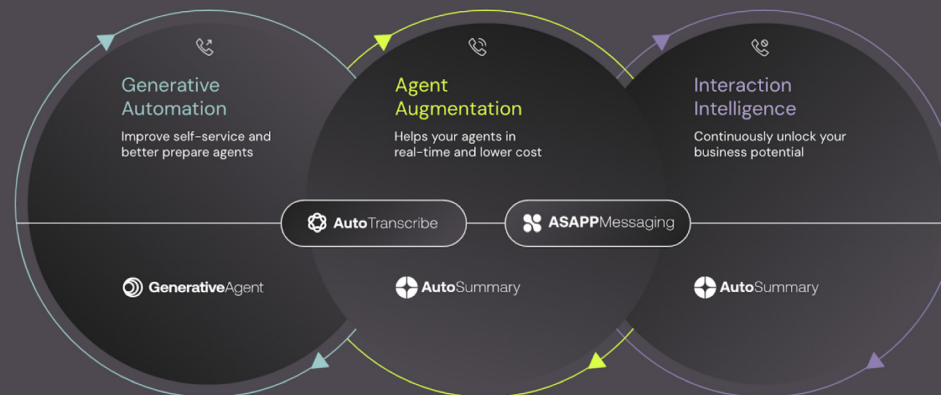
ASAPP is the AI-native software for contact centers, and ASAPP exists to end bad customer service.

We help customer service leaders unlock their full value by minimizing costs & inefficiencies, improving agent compliance & productivity, and surfacing actionable insights while helping you deliver a great customer experience.

Our customers are large enterprises who care deeply about leveraging AI to transform CX by delivering unprecedented cost savings and maximizing customer delight.

What do we make?

We make a full suite of AI-native solutions designed specifically for the needs and nuances of the CX industry.



Increase productivity, seize revenue opportunities, and improve compliance.



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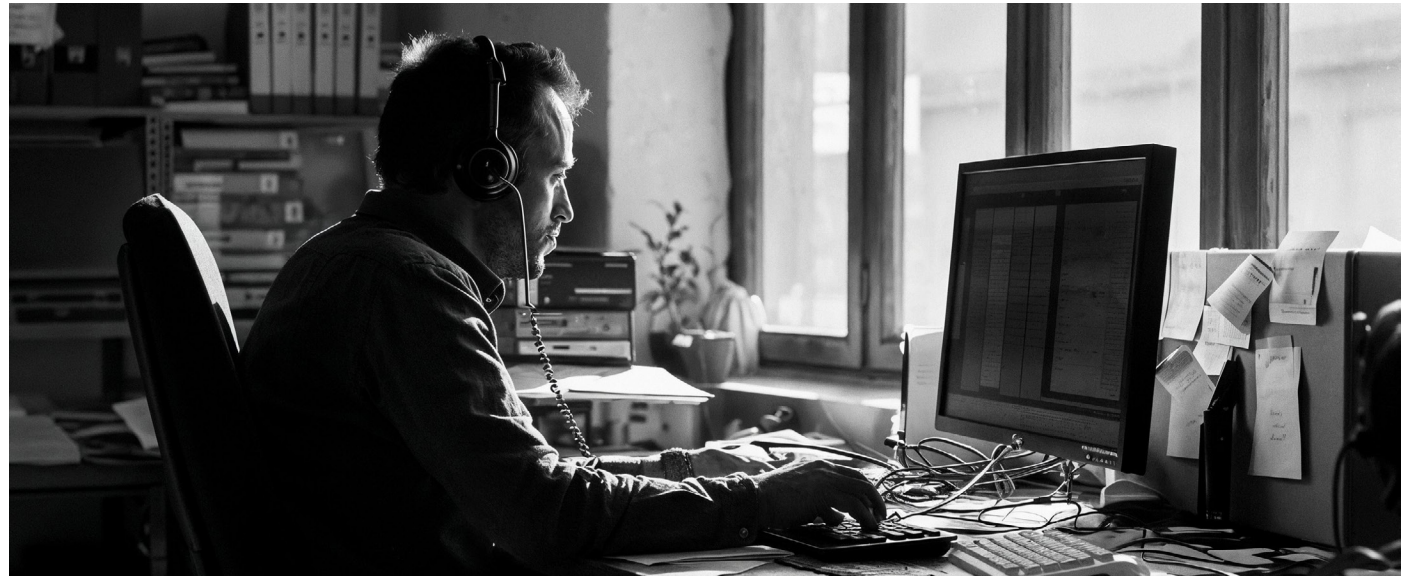
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Why we are the right partner

How does ASAPP do summarization, and why should you start your vendor search with us?

Because we believe that transcription and summarization is the foundation of your present and future AI endeavors, and that you can get massive value from summarization alone, we take it seriously and continually work to deliver the best solution on the market. We provide:

- The best, most accurate, and fastest summarization and transcription on the market.
- We allow you to customize not only length and format, but also specify key topics or entities that you want to record, such as competitor mentions, mentions of a new product, service, or initiative, and successful or unsuccessful sales attempts.
- Automatic creation of aggregated data that you can see in our dashboards or other business intelligence tools.
- Robust data enrichment capabilities to make sure that you are capturing evaluation, compliance, fraud, sentiment, and other considerations.
- GenAI powered conversation search in our conversation explorer, automatically tagging info based on configuration of key topics/entities.
- Ability to create different configurations for different groups of agents (for example, by line of business, experience, etc).
- Unbiased customer sentiment measurement and insight into drivers and intents.
- If you also use ASAPP's AutoTranscribe, you will be leveraging it's instant, accurate, and customizable transcription capabilities.



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We strive to be the best technology partner you have ever had.

ASAPP is not new to the AI or the CX space. We have been building AI-native products for the contact center since 2014 and building our own LLMs since 2018. We invest heavily in our products and our workforce to bring our customers the best solutions on the market and the subject matter experts to ensure those customers are getting the maximum benefit.

We offer white glove service and insight into contact centers' best practices across industries, and our consultative nature drives transformative results. ASAPP is laser-focused on business outcomes, data usability, and on helping you realize your desired customer experience.

If you are interested in generative AI for your contact center, please click below to schedule a consultation.

[Speak to an Expert](#)



