

2025
NOVEMBER
MARKET
STUDY

TECH VS. HUMANITY

Redefining The Agent Role



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Intro

AI will elevate rather than eliminate humanity.

Thought leaders have enthusiastically trumpeted this concept, and research confirms that executives have widely embraced it.

But will employees and consumers actually experience it? Will they actually enjoy a world in which technology is removing barriers to human connections?

As AI investment soars, so too does the urgency of answering these questions. Customer contact leaders need to know precisely how AI is transforming interactions and workflows. Equally importantly, they need to know exactly what this transformation means for the future of the human contact center agent.

To empower leaders with much-needed clarity, CCW Digital is thrilled to share this new market study. Driven by in-depth research, it uncovers the present state of AI investments, the impending evolution of frontline customer interactions, and the future of the agent role.

With precise insight into how AI can best elevate employee performance, and vice versa, you will have a blueprint for optimizing the technology and human balance. You will ensure both work together to turn customer frustration into trust and transactions into relationships.



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Methodology & Demographics

To navigate the technology vs. humanity balance and redefine the agent role, CCW Digital conducted a survey in the fall of 2025. The in-depth study captured insights from leaders in the contact center, customer experience, marketing, information technology, and operations spaces.

Representing organizations of all sizes and most major industries, respondents hold job titles like director of contact center operations, head of customer service, director of customer experience, vice president of the contact center, director of guest experience, vice president of marketing, vice president of customer care, chief information officer, chief operating officer, and director of guest care.

About the Author



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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology, and employee engagement research initiatives for CCW. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars, and online events reach a community of over 180,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.



Key Findings

- 1 AI has not yet radically transformed customer contact, but it has made a positive impact. The overwhelming majority of leaders are celebrating gains in efficiency, analytics, customer experience quality, and employee experience quality.
- 2 Moving forward, top goals for AI investments will include cost savings, better interaction standards, greater interaction efficiency, and higher satisfaction scores.
- 3 Beyond citing the impact on *business objectives*, the majority of customer contact leaders believe AI has thus far augmented *humanity* within their experiences. There is, however, reason to question whether the impact is truly living up to the hype.
- 4 When determining how to balance AI and human agents on the frontlines, top considerations include issue complexity, issue significance, and real-time contact volume.
- 5 Leaders will also account for the specific advantages humans have over automation solutions. Right now, leaders see the ability to express empathy, the ability to relate to real-world experiences, the ability to recognize issue significance, and the ability to make off-script decisions as fundamentally “human” strengths.
- 6 Ultimately, however, optimizing the AI-human balance remains a work in progress. Only 13% of leaders have clearly mapped out the future of the agent role. Particular ambiguity surrounds the impact human agents will have on non-interaction tasks, such as bot tuning, knowledge creation, and data analysis.
- 7 Not simply useful for workflow planning, achieving clarity will be critical to securing employee buy-in. More than two-thirds of leaders say their agents’ willingness to take on “complex work” is conditional upon the specific tasks they will handle, the specific guidance they will receive, and the specific compensation they will earn.
- 8 It will also be critical for refining recruiting, hiring, and training – all of which warrant attention. As it stands, only 13% of leaders believe their current agents are equipped for a complex, high-value work slate.
- 9 Beyond skills limitations, leaders cite fragmented systems, insufficient data and knowledge frameworks, inadequate coaching, and unsuitable career paths as top inhibitors to agent development and performance. Exacerbating the situation, a significant number of contact centers *lack* a singular view into agent productivity.
- 10 When leveraged correctly, technology should remedy these pain points. Top agent-facing AI priorities include knowledge management, call summarization, workflow automation, copilot/agent assist, and post-call automation.
- 11 Maximizing the return on these technology investments will require businesses to address operational concerns. Notably, they will have to create a better framework for measuring AI’s impact, alleviate change management concerns, and mitigate risk management worries.
- 12 They will also have to establish a consensus on how to prioritize their investments; as it stands, today’s leaders are split on whether they should place the greatest emphasis on internal preferences, root cause analysis, or marketplace trends.
- 13 Finally, they will have to create an *environment* that allows technology *and* humans to thrive. Top considerations include workplace culture, management and leadership quality, compensation, and flexibility.



State of Transformation: Is AI Making a Positive Impact?

AI has not been a silver bullet for the customer contact function. It has not prevented customers from complaining about slow, impersonal experiences. It has not saved agents from the frustrating, inefficient tasks that lead to disengagement and churn.

Customer contact leaders do, however, believe it is *starting* to make a positive impact on numerous facets of their operation.

Nearly 89%, for example, believe their AI investments are boosting operational efficiency. An impressive 40% celebrate the efficiency gains as “significant.”

They are nearly as celebratory when discussing the impact of AI on analytics; 84% cite *some* degree of positive impact, and 40% call it significant.

Though not *quite* as resounding, the numbers for customer experience (82% celebrate some impact, 28% call it significant) and employee experience (81%, 22%) are still encouraging.

Customer contact leaders will look to build upon these results in 2026 and beyond, holding their AI investments accountable for specific performance indicators.

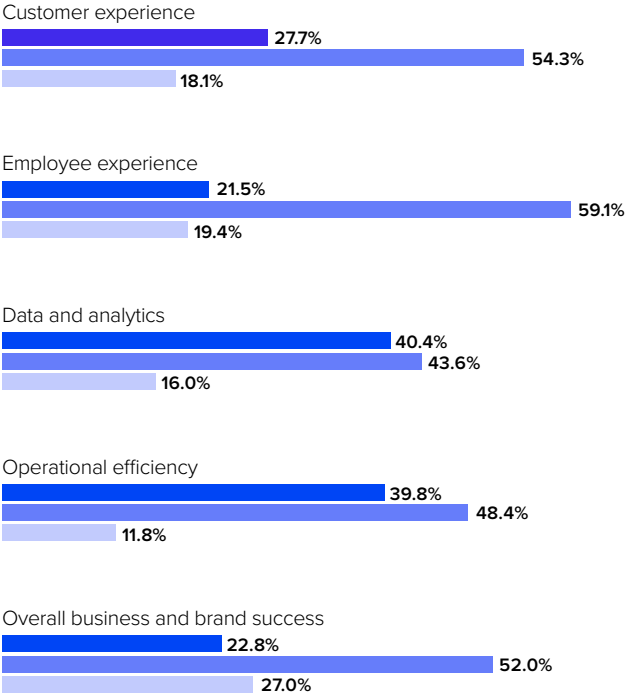
Priority outcomes include cost savings (a target outcome for 87%), better interaction quality (83%), improved interaction efficiency (81%), and enhanced customer satisfaction scores (80%).

In emphasizing these metrics, leaders are affirming their optimism in AI as a “best of both worlds” technology. They see it as a way to simultaneously reduce operational inefficiencies and elevate experience quality.

If it delivers on that dual expectation, customers, employees, and business stakeholders will all benefit from the AI revolution.

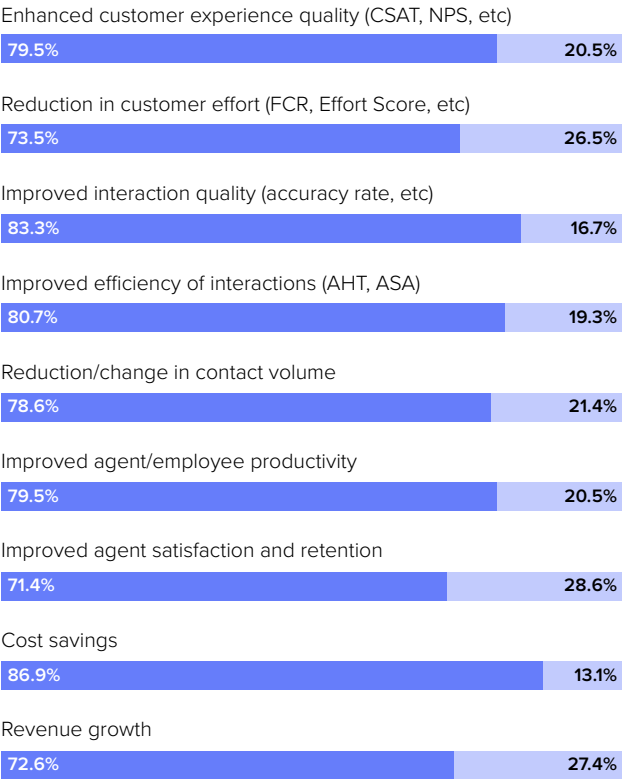
Have your AI investments and initiatives positively impacted the following areas?

- Yes, significantly positive impact
- Yes, slightly positive impact
- No or unsure



Do the following represent important objectives or KPIs for your AI self-service investments?

- Yes
- No



HOW IS AI IMPACTING HUMANITY?

With tangible reason for optimism, customer contact leaders are not going to relent in their AI investments. They are going to continue deploying technology and continue seeking meaningful transformation.

This means that the question of what the rise of AI will mean for humanity will only command more attention in the months and years ahead.

Within the customer contact community, thought leaders continue to argue that “AI will be about augmenting rather than eliminating the human touch.” More than 60% of consumers, however, worry that AI will reduce their access to human support. Upwards of 52% fear a pivot to more generic, impersonal support experiences.

Which perspective will prove right?

For the “AI will augment humanity” crowd, the status quo provides a cautiously upbeat outlook.

Thus far, 83% of customer contact leaders believe their AI investments have at least somewhat elevated humanity. Just over 21% feel AI has made self-service and employee-led interactions more human; 33% have exclusively seen benefits to self-service, and 29% have only seen a positive impact on employee-led ones.

Encouraging on the surface, the data may still provide fuel for cynicism.

The most superficial and cliché AI use case – a self-service chatbot that can resolve certain “simple issues” – should automatically increase humanity. More conversational and contextually aware, an AI self-service tool should inherently feel more “human” than traditional FAQ pages or IVRs. And by freeing them from repetitive work and arming them with more customer data, this enhanced self-service offering should inherently empower agents to demonstrate more humanity.

The fact that 100% of organizations are not reporting a boost in humanity across self-service or agent-led interactions, therefore, raises questions about operational frameworks and strategies.

If AI-based self-service does not feel more “human,” it is likely because organizations are not letting the solution play to its strengths. They may not be providing it with the “single source of truth” it needs to generate personalized messaging. They may not be allowing it to take actual action or provide real resolutions. They may not be allowing it to adapt to a more natural conversation flow.

In a sense, they may be presenting their AI self-service platform as a static deflection tool – as nothing more than a more expensive FAQ page.

Any success on the self-service front, moreover, should empower agents to better understand and focus on the customers they are serving. If that is not translating into a more human experience, it would suggest some combination of skills limitations, poor coaching, unsuitable performance metrics, or undue restrictions on their ability to go “off-script” for customers.

If these employee experience limitations are not addressed, it will not matter how advanced the self-service tool is. Agents will not be capable of delivering an elevated experience. They will *not* come across as a warmer, more “consultative” alternative to the “script readers” of yesterday.

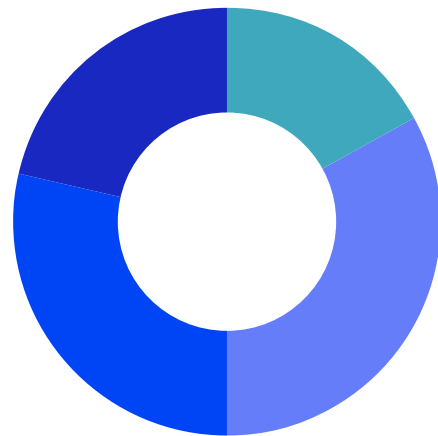
A longer-term issue concerns the “humanity standard.” Will brands be looking to maximize the humanity of their customer journeys? Or, will they settle for a minimum viable level of humanity?

An AI-enhanced self-service platform may, for example, understand natural language and deliver decently personalized, highly relevant resolutions. But it may not do *everything* a human employee could do, especially as it relates to demonstration of empathy and commitment to relationship-building.

Will the business restrict customers to the self-service option because it is “human enough” to handle most issues? Or will it guarantee them seamless access to the human agent capable of going above and beyond?

The answers will be important as the AI revolution unfolds.

Thus far, do you believe investing in AI has led to increased humanity throughout your CX?



- 17.0% No, our experiences have not become more human
- 33.0% Self-service experiences are more human-centric; agent interactions are unchanged or less so
- 28.7% Agent-led interactions are more human-centric; self-service is unchanged or less so
- 21.3% Both self-service and agent-led interactions are more “human”



Rethinking Customer Engagement: Vision for a New Front Line

In their quest to improve efficiency, elevate quality, and strengthen customer relationships, customer contact leaders will have to evaluate their front lines. They will have to determine whether their balance of technology and humanity is the best way to cultivate customer satisfaction, trust, and loyalty.

The customer contact community has not yet reached a consensus on the exact way to approach this balance. Many are, however, confident in letting AI play a meaningful role.

In an ideal world, 30% of businesses say they would let AI handle *most* of their frontline communication. Humans would be in the loop to provide guidance, critical thinking, and approvals, but AI agents would be leading the actual engagement.

Another 21% still believe in AI-human synergy, but they are less hardline on which should handle the actual engagement. Their intention is simply to use a combination of automation and manual effort in most situations.

Less enthused by this singular, more synergistic approach, 28% believe in a binary philosophy. They believe certain issues should wholly sit with AI agents, while others should exclusively warrant human involvement.

Just over 19% remain dubious of using AI in frontline communication. They believe *humans* should handle the majority of customer conversations; any AI investments will be about empowering these agents behind-the-scenes.

WHEN DOES HUMAN INVOLVEMENT MAKE SENSE?

The overwhelming majority of customer contact leaders believe AI *can* play a pivotal role in the frontlines. They believe it can handle some, if not most, customer-facing conversations.

Many nonetheless recognize the likelihood of cases where AI is ill-equipped to quickly, seamlessly, and accurately support a customer.

And even if leaders are confident that few exceptions exist, they still have to consider the voice of the customer. If customers are convinced a human agent is required for a given issue, many leaders – even those very bullish on AI technology – will consider accommodating.

So what are these factors? What will impact whether an organization routes customers to a human agent vs. a self-service option?

For today’s customer contact leaders, “issue complexity” ranks as the #1 consideration. More than 89% of organizations will make their determination based on the specificity and complexity of the matter.

Other key factors include issue significance (80%), real-time contact volume (75%), and time of day (69%).

Do the following represent important objectives or KPIs for your AI self-service investments?

- Yes, this will impact whether we provide access to a human
- No, this will not impact whether we provide access to a human



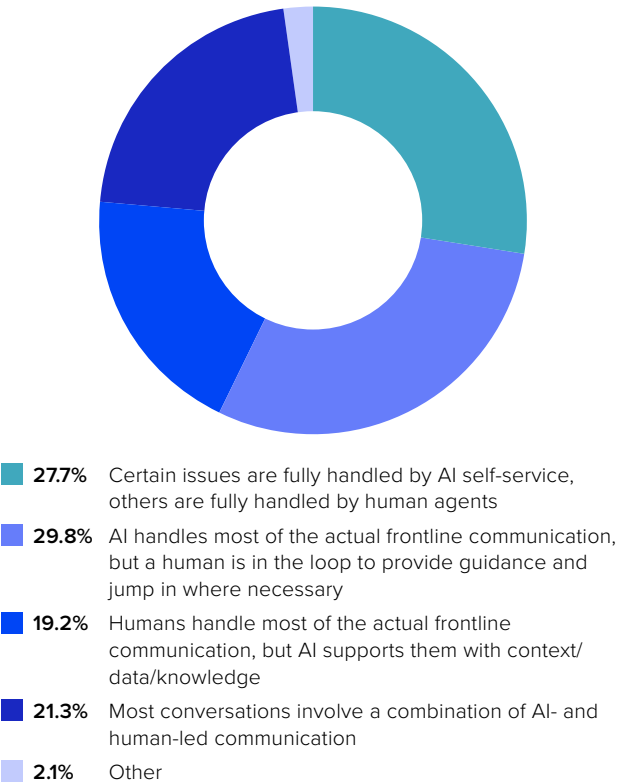
On the one hand, it is highly intuitive that issue complexity and significance would rank as top considerations. Still in its early stages, AI is routinely positioned as the option for “simple issues.” Human agents, moreover, have more trust to navigate the complicated, personal matters that have enormous ramifications for customer sentiment, brand reputation, and financial health.

On the other hand, the “AI for simple, humans for complex” divide can eventually become a self-fulfilling prophecy. If brands continue to position AI as an option for the most straightforward, generic issues, they condition customers to see *human agents* as their best pathway for a more valuable, tailored resolution. This will not only bottleneck self-service *containment* but discourage customers from even *starting* in a self-service environment.

In turn, the brand will have less opportunity to learn how customers would navigate self-service for a given intent. They will also have less opportunity to capture customer context prior to escalation; the agent will have to directly ask for all this information, reducing efficiency and the perception of personal recognition.

The emphasis on real-time contact volume and business hours reflect a belief in AI as a scalability play. All organizations will inevitably encounter volume surges and receive requests outside of business hours. Based on their resource needs, they can determine the balance of AI and human support that will keep wait times and operating costs as low as possible.

When it comes to frontline engagement, what do you see as the ideal AI/tech vs. human balance?





Redefining the Agent Role: A Vision for the Future of Agent Work

There is a distinction between trumpeting the importance of an AI-human balance and actually *defining* it. How will AI transform the future of customer interactions? How will employee responsibilities change as a result of that transformation?

There is also a distinction between *defining* the AI-human balance and actually *optimizing* it. Are tasks and responsibilities being allocated at random or based on past expectations? Or, are they being divided in a way that will maximize performance, efficiency, and customer centricity?

Most businesses are aware of the high-level call-to-action – they know they want to use a combination of AI and humanity. Many, however, are uncertain about the specific dynamics of that balance.

More than 23% of leaders, in fact, have no real clarity on what the rise of AI will mean for human workers. Just shy of 64% know how day-to-day *customer service* interactions will change, but they are unsure of the new tasks, focuses, and responsibilities that will become part of their agents' workflows.

Only 13% feel confident they understand how the agent role is evolving.

When AI was in its most *experimental* stages, this ambiguity was permissible. AI was not meaningfully impacting workflow, which meant that organizations faced little pressure to rethink their hiring, training, compensation, and performance management strategies.

Does your organization have clarity on what the rise of AI will mean for employee workflows and responsibilities?



- **23.4%** Not yet - we are still evaluating how AI will impact the role of the agent
- **63.8%** We have an understanding of how their core day-to-day tasks will change, but we've yet to map out the new tasks and functions for which they will be responsible
- **12.8%** We have a complete understanding of how agent roles and responsibilities will transform

Which best describes how agents feel about the concept of AI automating simple issues so they can focus on more complex ones?



- **13.8%** Unclear; our organization has not done enough to clarify how simple vs. complex issues will be defined
- **5.3%** They are not interested; they prefer handling straightforward, simple tasks
- **69.2%** They are potentially interested, but it will depend on factors like the nature of the work, changing processes, and compensation/career pathing
- **11.7%** They are all-in; they are craving more complex tasks and will jump at them even if systems, processes, and compensation do not meaningfully change

But as AI becomes a cornerstone of the customer contact operation, any ambiguity will become catastrophic. Workflow *will* change dramatically, which means organizations require vivid insight into the ramifications for agents. Without that clarity, they cannot design the right workflows, cultivate the right skills, allocate the right resources, and analyze the right metrics. They cannot elevate their operation.

THE BUY-IN CHALLENGE: ARE AGENTS EMBRACING NEXT-GENERATION WORK?

Not simply a threat to operational decision-making, workflow uncertainty jeopardizes agent buy-in.

Whereas customer contact leaders have historically positioned the rise of AI as an inherently pro-employee movement (AI will handle the boring work agents do not want to do, enabling them to only focus on more “complex,” exciting, and rewarding work), many recognize the hazard in taking that stance for granted.

Employees may appreciate the broad promise of variance in their workdays, but they still require specifics. They still want to know exactly how their job will change, and exactly what those changes will mean for their day-to-day experiences and long-term career trajectories.

They want to know if the pivot to more complex, consultative work will be more engaging or rewarding – or simply harder and more mentally draining.

Only 12% of leaders, in fact, say their agents are “all-in” on the “AI for simple, humans for complex” dynamic. By contrast, 69% feel agent interest is *conditional* upon the specific nature of the work, compensation changes, and new processes.

Another 14% are so unclear on the AI-human divide that they cannot even gauge interest.

Whether “complex work” will actually be *harder* in a particular organization remains to be seen. What is more certainly true, however, is that agents who can pair their *existing experience* with *new competencies* will be in the best position to succeed.

This means that agents will have to be satisfied with the organization (and thus willing to stay and share their experience) *and* motivated with the new vision (and thus willing to accept new responsibilities and cultivate new skills).

Clarifying the evolution of the role, and transparently communicating what it means for the individual agent, will be the key to achieving both.

When thinking about the tech-human balance, which key advantages do human agents have over AI/self-service?

- Humans are better at this, and it's important
- Humans are better at this, but it's not important
- I do not believe humans are clearly better at this

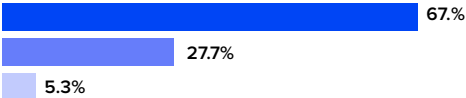
Ability to show emotional empathy/concern



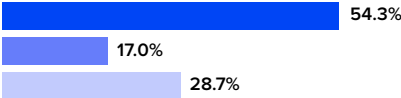
Ability to understand the urgency/stakes of a situation



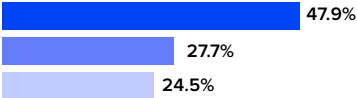
Ability to relate to real-world experiences ("I remember when I had that problem myself")



Ability to understand and explain complicated or inconsistent knowledge entries in simple terms



Ability to adapt to specific customer personalities and tones



Ability to make appropriate decisions about going off-script/above-and-beyond



THE HUMAN ADVANTAGE:
WHAT UNIQUE VALUE WILL LIVE
AGENTS PROVIDE?

Transparently defining the future of the agent role may be critical, but it is only possible if organizations can overcome existing questions and uncertainties – and precisely define how workflows and responsibilities will evolve.

One way to *begin* answering those questions, however, is to identify the key advantages humans have over AI. With clarity into the type of work that should sit with humans, organizations can better prioritize AI use cases – and better design future processes and workflow strategies.

Empathy is at the heart of this conversation. Nearly 94% of leaders believe human employees are fundamentally better at showing concern for customer issues, and 82% believe this advantage will be *critical* when defining the future of the agent role.

An even greater 95% believe employees are fundamentally superior at relating to real-world customer experiences, although a lesser 67% believe this is critical to workflow allocation.

Other critical differentiators between humans and AI are the ability to understand the stakes of a situation (93% cite the advantage, 78% call it important to workflow design) and off-script decision-making (93%, 72%).

Recognizing these advantages does not prevent an organization from relying heavily on self-service for frontline communication. It does, however, at least underscore the importance of having a human in the loop.

If customer-facing AI is not supported, scored, and optimized by employees who understand the emotions of a situation, what it means in practice, and how to think critically about unique resolutions, it will never excel as a customer support vehicle. It will never boost customer trust in the brand's ability to recognize and adapt to customer needs and, in turn, inhibit the ability to turn customer contact transactions into customer-centric relationships.



Understanding Next-Generation Skills: Are Agents Ready for an Evolved Performance Standard?

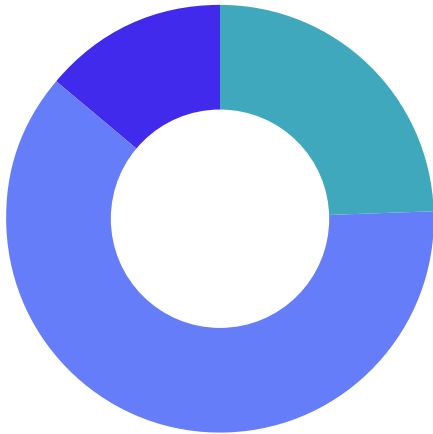
In comparison to AI, customer contact leaders believe humans are inherently more capable of emotional intelligence, empathy, contextual awareness, and creative decision-making.

That comparative confidence is not, however, the same as an unequivocal endorsement. It is not the same as saying that existing contact center agents are optimally suited for a role that will require them to handle more complex inquiries or engage in a more conversational, emotionally charged context.

More than 24% of leaders, in fact, question whether their existing agents could ever handle such elevated workflow. They believe their typical agent is specifically suited for “basic support.”

Just shy of 62% of leaders believe agents are suitable for emotionally and intellectually complex *support* conversations, but they are not as confident in a pivot to non-interaction work. A mere 14% believe their agents would excel at a work slate involving high-stakes customer interactions, sales, data analysis, and bot training.

Consider the typical agent that works in your current contact center/customer support operation. Are they suitable for “complex work”?



- 24.5% They are best-suited for basic customer support
- 61.7% They are suited for complex/emotional support inquiries, but not necessarily tangential tasks like sales, data analytics, or bot training
- 13.8% They are suited for complex customer support *and* related areas like sales, data analysis, and bot training

Since more than two-thirds of leaders still expect agents to play a key role in frontline communication, these statistics may not seem concerning in the short-term. The majority of employees will remain capable of handling frontline interactions, even as those interactions become more complex and emotionally demanding.

They do, however, raise questions for the long-term. As the power of the technology increases, brands may become more confident in letting AI handle a greater percentage of frontline communication. This would greatly limit the amount of contact volume that requires direct agent involvement – and thus greatly limit the number of employees needed on the frontline.

To avoid job loss in that scenario, the contact center would have to allocate agents to non-support tasks like knowledge management, sales, AI oversight, and feedback analysis.

Without empowering today’s agents for *that* type of work, contact center leaders could eventually find themselves in a difficult situation. They will either have to accept lesser performance (thereby reducing the impact of AI investment) or replace their talent (thereby eliminating job security).

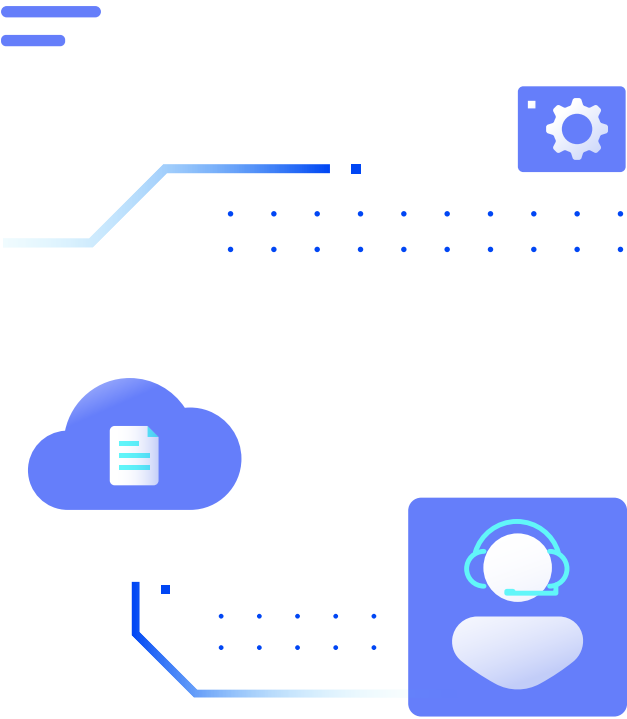
AGENT EMPOWERMENT: FAR FROM A REALITY IN TODAY’S CONTACT CENTERS

The fact that some agents are theoretically suitable for high-value conversations does not mean they are *presently* ready to thrive. Nearly 59% of leaders believe their agents lack the necessary skills for success.

Having agents with the right technical skills is not, moreover, the same as empowering agents to use those skills. The overwhelming majority of contact center leaders acknowledge troubling friction within their organizations. This friction would inhibit even the most capable agents’ ability to thrive at consultative work and thus dampen the impact of AI transformation.

Particularly common inhibitors include fragmented systems and tools (73%), insufficient knowledge and data frameworks (71%), inadequate coaching programs (69%), unsuitable compensation and career path strategies (69%), and ill-prepared managers and supervisors (68%).

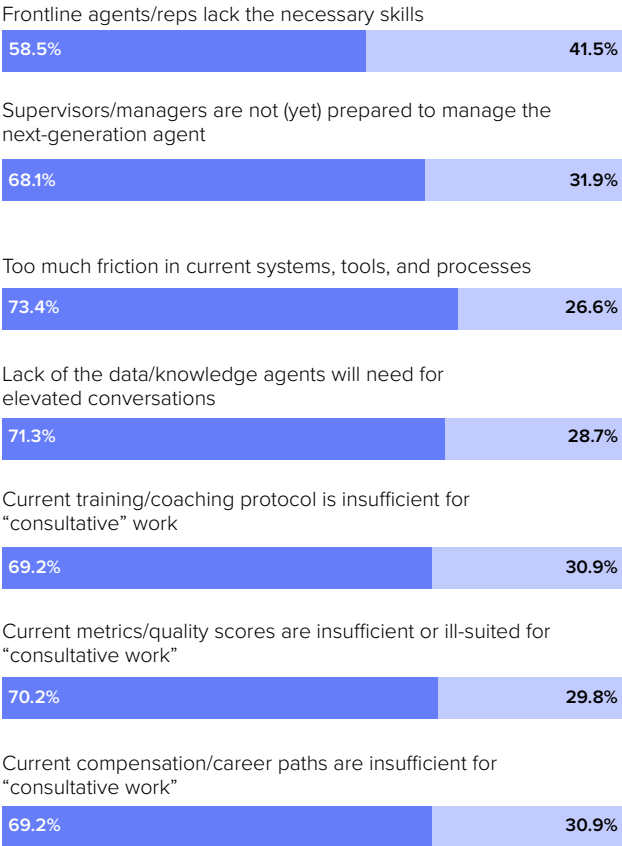
A deeper dive into existing “pain points” confirms the adverse impact of insufficient customer intelligence (a challenge in 69% of organizations), outdated knowledge bases (62%), time-consuming administrative work (57%), and mandatory disclosures and authentication processes (56%).



Collectively, these inhibitors provide a sobering commentary on the state of the contact center. They suggest that agents will not receive the time, training, data, coaching, or incentivization they need to thrive in the new normal.

Consider your current customer contact team and environment. Will any of the following prevent them from quickly excelling at more complex, consultative work?

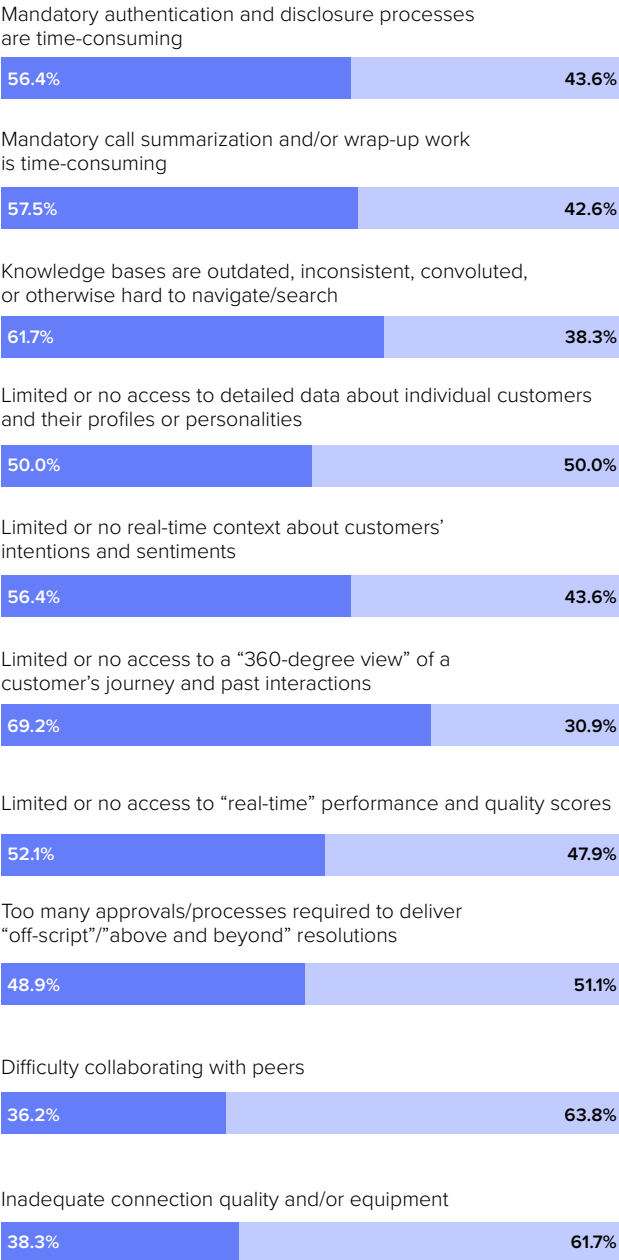
Yes No



Those without the skills for next-generation work will struggle to develop them, and those with the skills will struggle to use them. Operational efficiency, agent engagement, and customer experience quality will all suffer.

Do your current human agents/representatives face any of the following operational challenges?

Yes, this is a challenge for our employees
No, this is not a challenge for our employees





Augmented Humanity: Can AI Empower Agents For Next-Generation Work?

Unclear visions, skill limitations, and inhibitive environments are coming together to prevent employees from reaching heightened standards of performance. They are compromising employees' ability to demonstrate the *humanity* that represents their biggest advantage over AI technology.

To create the optimal contact center balance, one that accentuates the respective strengths of AI solutions and human workers, leaders cannot let these challenges stand. They must streamline workflow. They must eliminate friction. They must augment performance.

The rise of AI is emphasizing the importance of this effort. By handling more straightforward tasks and consumer inquiries, it creates a need for humans to handle a different sort of work – and an expectation that they will do so with added levels of empathy, critical thinking, and contextual awareness.

Fortunately, the right AI can also help achieve this empowering atmosphere.

**REVIEWING ROADBLOCKS:
UNDERSTANDING WHAT DRIVES
EMPLOYEE EFFORT AND FRUSTRATION**

To identify opportunities for agent augmentation, the typical contact center leader will require an understanding of current performance levels and barriers. Are agents presently meeting their performance goals? And, if not, what factors are standing in the way?

Many can at least *partially* answer these questions, but most have a long way to go before they can claim a complete understanding.

Nearly 32% feel they have a comprehensive, real-time, unified view of individual agent performance. Just under 25% have a clear, big-picture view but may struggle to drill down to the individual agent level. More than 34%, meanwhile, have vivid insights into agent performance but concede that their perspective may be fragmented across systems, teams, and channels.

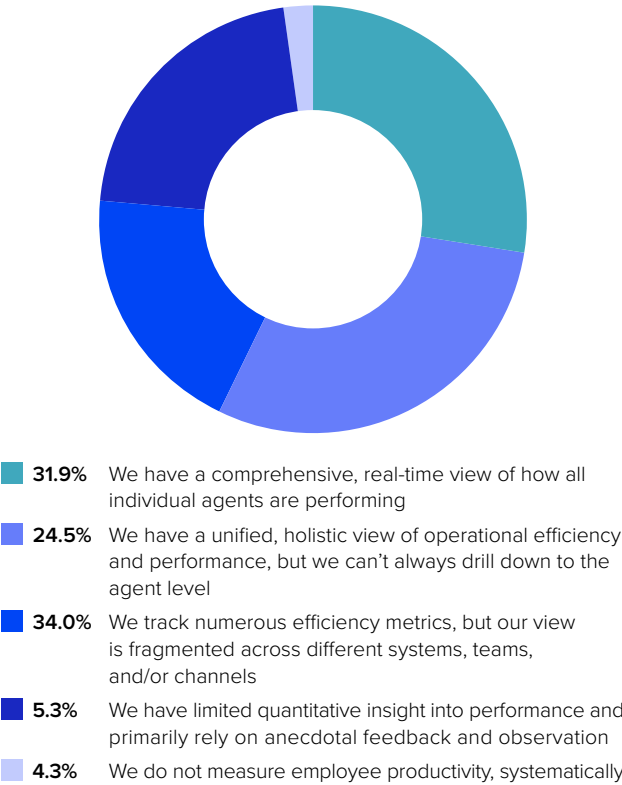
To understand how internal effort is *hurting* performance, many organizations evaluate the impact on customer satisfaction metrics (71%) and efficiency metrics (65%). Lenses like supervisor performance reviews (43%), internal search activity (37%), and voice of the employee feedback (35%) are comparatively popular, but they remain underutilized by the majority of organizations.

Although it is encouraging that most organizations are evaluating employee performance and effort levels to some extent, it is clear that many have work to do.

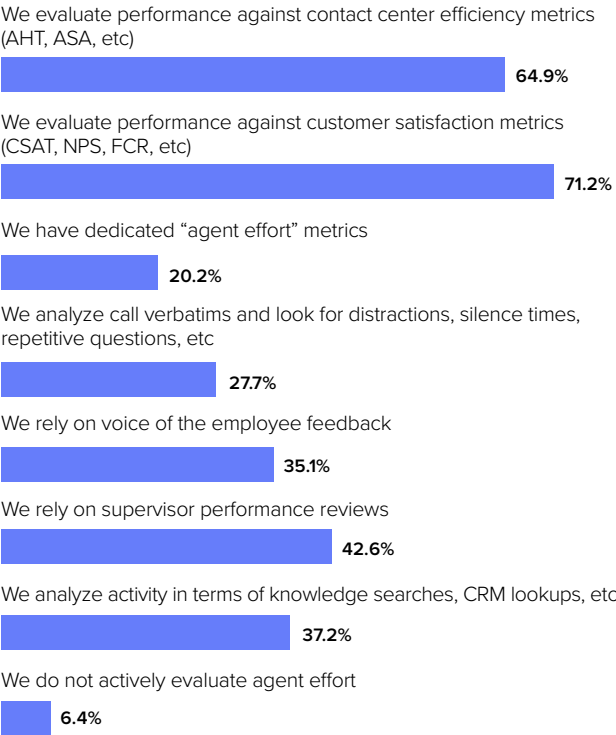
If contact centers are looking to pivot from a transactional support function into a true relationship driver, they will require a more complete view of performance. Insight into 360-degree, agent-specific performance will become non-negotiable.

Accurately defining inhibitors to that performance, meanwhile, will require a more robust approach to identifying agent friction. Placing an even greater emphasis on factors like tool utilization and voice of employee feedback will prove *particularly* important in today's landscape, as leaders need to know exactly how their AI investments are resonating with frontline users.

Which best describes your ability to measure and analyze employee productivity and efficiency?



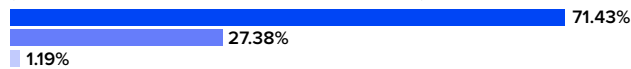
How do you presently measure or monitor agent “effort” / factors that inhibit productivity?



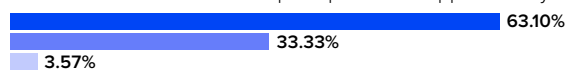
Rate the importance (or expected importance) of the following on agents' ability to build relationships with customers.

- Very important
- Somewhat important
- Very unimportant

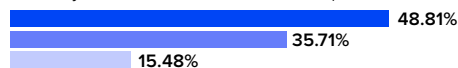
Access to case summaries from earlier in the journey (self-service, lower-touch channel, pre-transfer)



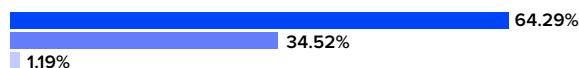
Access to the customer's complete purchase/support history



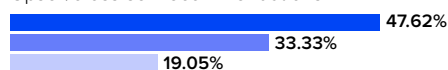
Visibility into trends across all touch points, social networks, etc



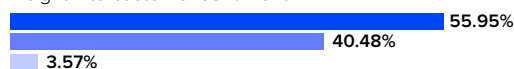
Next-best action recommendations



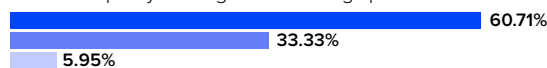
Upsell/cross-sell recommendations



Insight into customer sentiment



Real-time quality scoring and coaching tips



KEYS TO AUGMENTING HUMAN PERFORMANCE

Identifying and eliminating existing friction helps enable agents to perform at a higher, more human-centric standard. It does not guarantee it.

Transformation also hinges on empowering agents with *additional* insight and guidance for personalizing conversations, enhancing service quality, and building relationships.

Leaders almost universally recognize case summary access as a pathway to this augmentation. Nearly 99% call it important to provide agents with seamless access to summaries of customers' previous interactions; 71% call this insight very empowering.

Other augmentation priorities include next-best action recommendations (important to 98% of leaders, very important to 64%), access to the customers' complete purchasing and support history (96%, 63%) and real-time quality scoring and coaching (94%, 61%).

Collectively, these data points will provide agents with a rich set of *context* about the customers they are supporting. They will know the nature of the customer's relationship with the business, the intricacies of their prior interactions, the best way to tailor a conversation to the customer's needs, and the impact of their behaviors on that customer's satisfaction.

They will be able to recognize customers as humans with real needs, preferences, emotions, and expectations and not simply as faceless, nameless conversational counterparts.

Given their inherent proclivity for empathy, their *recognition* of each customer's humanity should drive agents to be more human-centric in their behaviors.

FROM INTEREST TO IMPERATIVE: TOP AGENT-FACING AI PRIORITIES IN 2026

Today's contact center leaders view reducing internal effort and providing actionable context as pathways to agent augmentation.

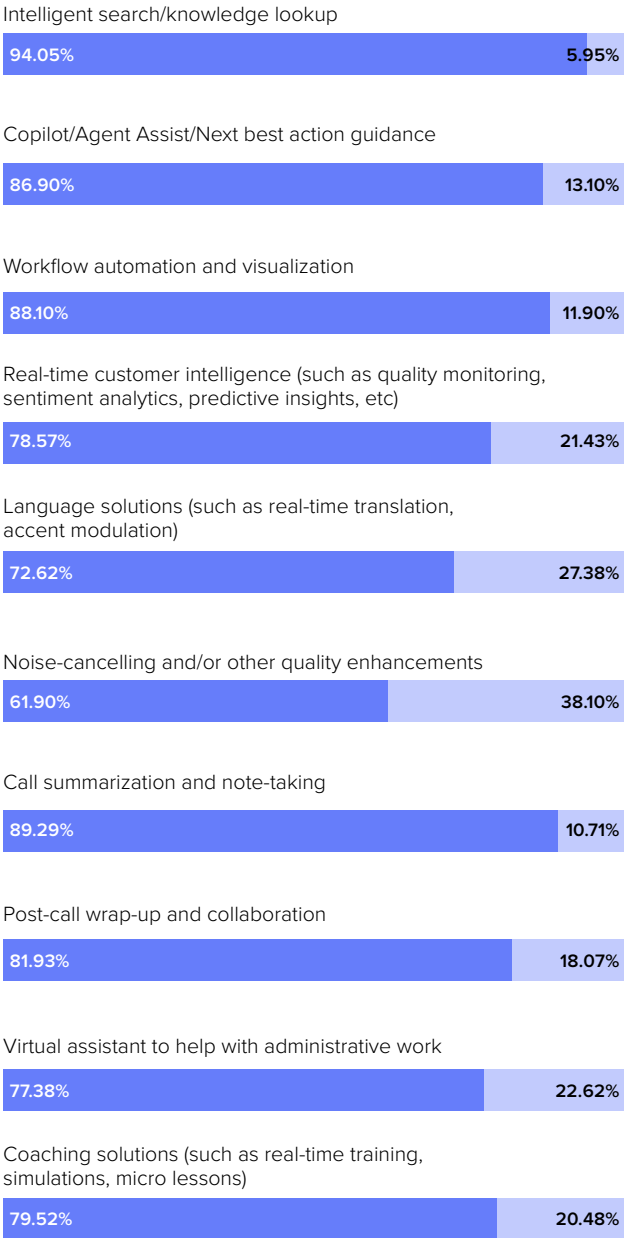
Their AI investment focuses align with this perspective.

More than 94% see intelligent search and knowledge management as a critical AI priority for 2026. Call summarization (89%), workflow automation and visualization (88%), copilot/next-best action solutions (87%), and post-call automation (82%) also rank as top use cases.

Collectively, these types of solutions will eliminate notorious inefficiencies *and* elevate agent performance. They thus position the AI revolution as an opportunity to impact both phases of the income statement; costs will fall as opportunities to cultivate more customer satisfaction, loyalty, and wallet share rise.

Which types of agent-facing AI use cases do you feel are important to pursue or continue pursuing in 2026?

- Yes, this is important
■ No, this is not important



Although they are not as *high* on the priority list, language solutions (73%) and audio enhancements (62%) are firmly in the AI conversation.

These solutions further reflect an interest in using AI to bridge human connections by making conversations clearer, more accessible, and more tailored to the individual. They further reflect the notion that technology and humanity are synergistic companions, not oppositional concepts.

MEASURING IMPACT: DO CONTACT CENTERS KNOW WHAT AI MEANS FOR AGENT PERFORMANCE?

Directly tied to widespread challenges like cumbersome processes, fragmented systems, and inadequate data, the priority AI solutions should move the employee experience needle. They should make agents better, and faster, at what they do.

But the stakes of customer contact performance require more than theoretically sound investments. They necessitate an emphasis on real results.

Are organizations in position to properly quantify the impact of AI?

A non-trivial 21% outright admit that they are not. They concede that they are not actively measuring the return on their AI investments.

One-third say they are monitoring certain outcomes but lack a standardized measurement framework. Another 30% are thoroughly measuring results but cannot always trace impact to specific tools.

Just 15% have a robust measurement framework in place.

Addressing the measurement gap will be *critical* moving forward. Beyond the general value of understanding results, robust performance analysis will help organizations navigate a still murky, uncertain AI market. It will reveal which use cases are generating impact, and how that impact is changing the nature of employee workflow.

Demonstrating proof of value, moreover, will help achieve buy-in at all levels of the organization. It will be a way to excite employees about the AI transformation, while also securing support (and budget approval) from business stakeholders who demand proof of success.

EMPOWERING ENVIRONMENTS: BUILDING A CULTURE OF AUGMENTATION

When thinking about the ideal framework for success, it is easy to fixate on technologies and processes. Are key tools and databases well-integrated? Is workflow well-defined?

It is just as important to consider the cultural environment. Will the overall agent experience attract and motivate the right talent?

While it took a backseat during COVID lockdowns in some organizations, *workplace culture* has re-emerged as the #1 priority for improving employee engagement and satisfaction.

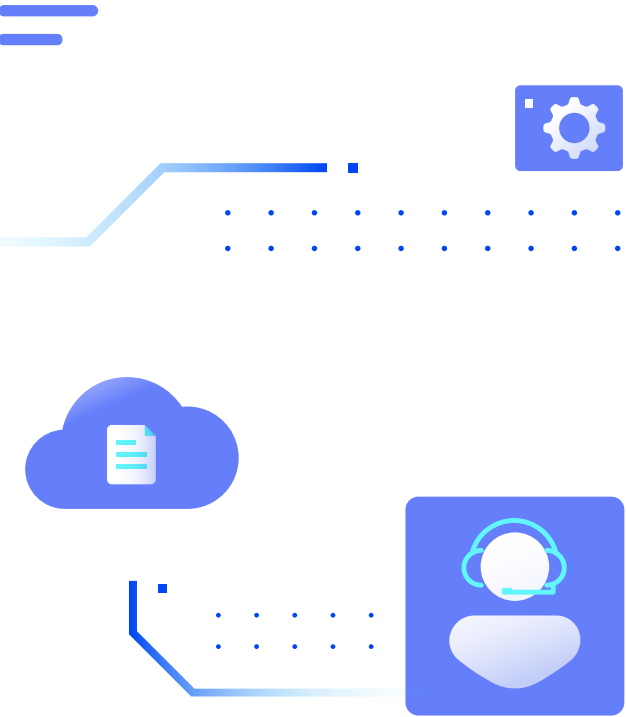
Quality of management and leadership ranks as the #2 driver, while compensation and career paths place in the #3 position. Flexibility, quality and convenience of tools, and workflow are the next-biggest focuses.

Specific rankings aside, it is clear that all factors will play a role in mobilizing the customer contact employee of the future. As these employees take on more challenging work, they will require organizations that support them with the right tools, training, and leadership support.

The fact that many will be handling more conversational, human-centric work, moreover, explains the particular value of workplace culture. Future conversations will likely be more emotionally jarring; issues will be higher stakes, and individual customers might be more heated or demanding. An organization that commits to employee *happiness* in the face of this adversity will be one that not only keeps agents engaged but ensures they bring that positive demeanor to the frontlines.

Moving forward, how will your organization rank the importance of the following on improving employee engagement, satisfaction, and retention?

- 1 Workplace culture and office experience initiatives
- 2 Quality of management/leadership
- 3 Compensation and career paths
- 4 Flexibility of work location and schedules
- 5 Quality/convenience of tools, systems, and processes
- 6 Workflow and types of interactions/tasks they get to perform





Technology vs. Humanity: From Aspiration to Action

The AI revolution does not simply promise more exciting, human-centric work for today's employees. It also promises a mechanism for making humans better at that work. By eliminating key sources of friction, elevating the training experience, and providing real-time empowerment, AI should enable humans to better leverage their emotional intelligence and creativity. It should allow them to look beyond transactions and focus on connections.

These are not empty promises; modern AI solutions are already capable of optimizing workflow and augmenting human ingenuity. Their accessibility, usability, and impact are all growing by the second.

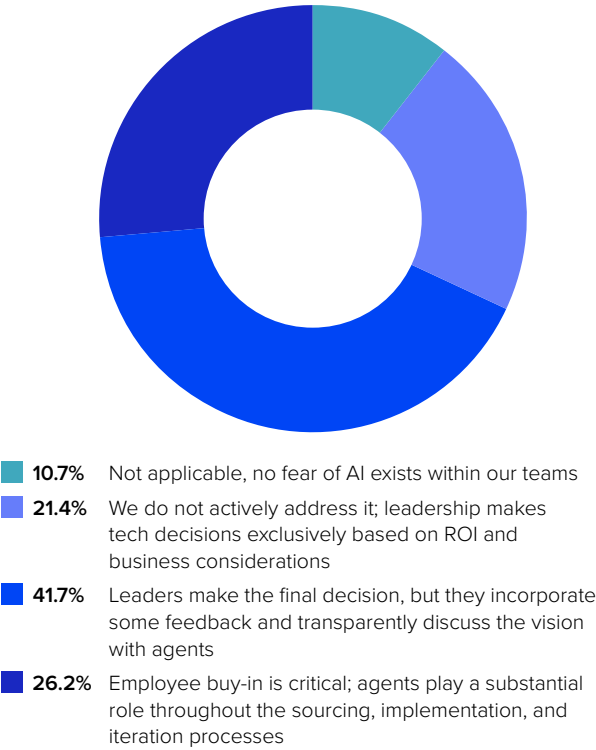
Nonetheless, there is an important distinction between availability and inevitability. AI may have the ability to elevate customer contact, but if the organization is not ready to make the necessary transformation, it will miss out on the opportunity. It will neither optimize the efficiency nor humanity of its customer experience.

Do any of the following represent barriers to scaling your AI investments?

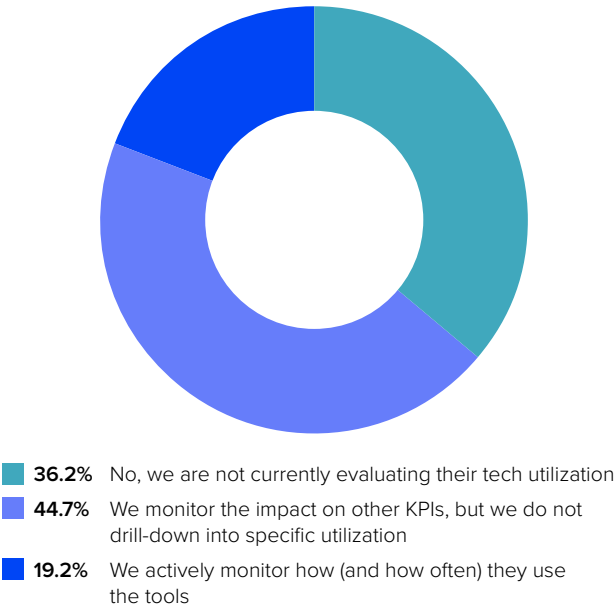
Yes, this is a challenge No, this is not a challenge



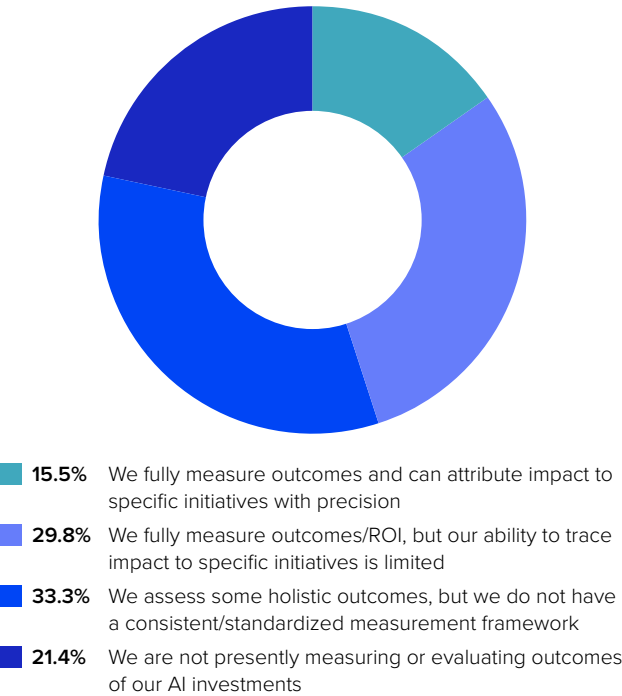
When pursuing new AI initiatives, how do you address any fears or reservations agents have about what it could mean for their jobs?



Do you measure the extent to which employees are engaging with your AI tools/solutions?



Which best describes your ability to measure and analyze employee productivity and efficiency?



BARRIERS TO AI TRANSFORMATION

What is standing in the way of AI transformation?

Presently, there is no answer more common than cost; nearly 81% cite budget as a barrier to scaling their AI investments.

Other top inhibitors include concerns about their existing technology framework (80%), risk management worries (80%), and present employee adoption and enthusiasm for AI (69%).

Previous CCW Digital research confirmed that nine-in-ten contact centers are facing efficiency pressure. More than 71%, meanwhile, say that AI pricing has proven costlier or at least more unpredictable than expected.

Given those realities, cost's status as a top inhibitor is unsurprising. Overcoming that reservation will require a combination of astute implementation strategy, an emphasis on more quantifiable success metrics, and support from vendor partners who tether their innovation to *business outcomes* and not just cool features.

Fragmented systems have been the enemy of so many customer contact technologies and trends; their inhibitive effect on AI marks yet another reason to take system unification and data harmonization seriously.

The risk management challenge will be interesting to monitor in the years ahead.

Which best describes your ability to measure and analyze employee productivity and efficiency?



- **31.0%** We rely on a comprehensive, data-driven analysis of root causes and KPIs related to efficiency and/or customer and employee satisfaction
- **40.5%** We rely on insights and recommendations from leaders, employees, and other relevant stakeholders
- **8.3%** We focus on industry trends, competitive intelligence, and popular use cases
- **20.2%** There is no singular framework; our AI initiatives are case-by-case

On the one hand, the maturation of AI technology should reduce the likelihood of costly hallucinations, inaccuracies, or inconsistencies, and thus make organizations more comfortable deploying the technology at scale. On the other hand, as comfort in AI grows, so too will the push to implement AI into higher-stakes customer interactions. That will strike its own chord with risk-averse organizations.

Insofar as omnipresent macroeconomic conversations – overall job market trends, stories about layoffs – shape sentiment, contact center leaders cannot completely control the AI narrative. They cannot completely eliminate employee skepticism.

Indeed, 90% of leaders acknowledge that their employees do have fears or hesitations about the impact of AI.

Many, though, will take action to minimize concerns within their organizations. Beyond providing the aforementioned transparency about evolving job roles, responsibilities, and trajectories, a significant number are beginning to involve employees in technology decisions.

More than 26% provide a meaningful seat at the table, involving employee feedback in the sourcing, implementation, and iteration processes. Nearly 42% do not provide quite as much of a platform, but they still listen to employee feedback and transparently share their technology roadmaps.

For some, this analysis does not stop at the sourcing and implementation phases. More than 19% of organizations closely analyze how employees are using the technology, ensuring it is resonating as desired. Just shy of 45% monitor the impact technology investments have had on employee KPIs, but they do not necessarily quantify actual utilization.

AI PRIORITIZATION: HOW DO BRANDS DECIDE WHAT MATTERS?

Today's customer contact functions face so many challenges. They also receive briefings on so many technologies and solutions.

Knowing they will face the aforementioned barriers to selecting and implementing specific solutions, how do they know which opportunities to prioritize?

In 40% of organizations, the sourcing *most commonly* starts from within. These teams make decisions based on the input of leaders, employees, and other key stakeholders.

As an alternative, 31% place a paramount emphasis on harder, more outside-in data. They look at an analysis of root causes or KPI performance before making investment decisions.

Just over 8% take a market-driven approach, looking at overarching trends and competitor behaviors. The remaining 20% say that they have no set framework; they take a case-by-case approach.

2025 November Market Study

PRACTICALITY GUIDE





Stop Undervaluing AI | A New Vision for the Tech-Human Balance in Customer Contact

Are customer contact leaders discounting the significance of artificial intelligence (AI)?

On the surface, the question may seem ridiculous. More than 90% of leaders identify AI technology as a critical investment priority. All routinely engage in debates and conversations about what the rise of AI means for their operations.

A deeper dive, however, reveals a *reductive* mindset toward the technology. By prioritizing the wrong use cases, downplaying the potential synergy with human ingenuity, and squandering opportunities to create new value, businesses are failing to take advantage of AI's true capabilities.

They are then left to wonder why customers reject their self-service offerings, why human employees miss their productivity goals, and why return on investment ultimately falls well short of expectations.

As 2026 arrives, it is time to break from this pattern. It is time to rethink the technology balance, ensuring that AI and human employees work at full strength – and in total collaboration – when delivering convenient, personalized, relationship-oriented customer experiences.

Let this briefing be your roadmap to success. After revealing where and why technology investments are going wrong, it details specific steps for not only optimizing AI deployments but reframing the human role to be more supportive, collaborative, and customer-centric.

AI: THE UNDERVALUED CUSTOMER EXPERIENCE OPPORTUNITY

In the theatre, what happens behind-the-scenes affects what happens on stage. In the contact center, what happens inside the operation affects what happens on the frontlines.

This means that when organizations take a reductive approach to AI, they end up weakening employee and customer experiences. Customers do not get what they want, agents do not feel empowered, and the entire operation fails to achieve its goals.

Three of the most consequential AI pitfalls follow.

Binary Approach to AI and Humanity

For customer contact leaders, the notion of “using AI for simple issues and agents for complex ones” has become as ubiquitous as phrases like “the customer is always right.”

Unfortunately, it also sends the wrong message about how brands should approach the AI-human balance.

First, it offers a very limited view of AI. The reality is that today’s generative and agentic AI solutions are capable of handling *most* inquiries – and delivering highly relevant resolutions. Restricting AI to only the most basic inquiries, such as forgotten password requests or billing reminders, simultaneously thwarts customer adoption (why would a customer use an AI agent knowing they can only get generic, scripted answers to simple questions?) and limits efficiency gains (if customers bypass self-service, agents cannot shift to other work).

Further, it takes a binary approach to the customer experience. It treats AI and human agents as isolated, oppositional entities that are exclusively suited for certain issues.

“Many times in our history, we have taken a binary approach to enhancing the customer experience. Voice or digital, automation or agent, efficiency or satisfaction. We’ve often treated these as mutually exclusive choices, when in reality they shouldn’t have to be.” - **Chris Arnold, ASAPP**

In reality, the best customer experience is one that uses a *balance* of AI and humanity to improve support scalability, better pinpoint customer sentiment and intent, anticipate future needs, and deliver timely resolutions. This means that AI can still play a *role* in highly complex matters, just as human agents can still contribute to “simple” matters.

By failing to achieve this collaboration, brands heighten the risk of delivering service that is inefficient, inconsistent, and inadequate.

They may also compromise the agent experience. If AI is strictly deployed for simple issues, agents will handle all the high-stakes, challenging, emotionally heated matters. This could hurt the agent experience, and amplify existing productivity, engagement, and retention challenges.

“Traditional technologies have done nothing to make these systemic issues better. In fact, those technologies eliminated the easy work, leaving human agents with the most complex and emotive interactions. All of this combined has led to increasing operational spend and lower customer satisfaction. Neither outcome is the desire of a successful business.” - **Chris Arnold, ASAPP**

Insufficient Emphasis on Conversations

The reductive approach to AI is not simply about poor use case selection. It also concerns an insufficient emphasis on conversations.

AI is supposed to be an *evolution* from the static knowledge bases and restrictive IVR menus of yesterday. It is supposed to understand natural language and respond with highly personalized, actionable resolutions. It is supposed to support meaningful engagement.

Far too many brands have fallen short of this standard, instead delivering customer-facing AI that was nothing more than a fancy FAQ page. This type of self-service experience alienates customers, who identify “difficulty explaining their issue” as the #1 reason they choose humans over bots.

This is neither to say that the best AI attempts to fully simulate the experience of speaking to a human, nor that AI has to flawlessly feign emotion. As the market study reveals, 82% of customer contact leaders believe concepts like “empathy” are fundamentally human qualities that should be reserved for live agents.

It is, however, to point out that self-service that fails to harness the true power of AI will be devoid of conversational capabilities – and thus unable to meet the necessary support standard.

Inadequate Strategic Vision

Notorious enemies of customer centricity, operational friction and fragmentation are also thwarting the AI transformation.

“Traditional solutions have not typically been well integrated to create a seamless suite of tools that can offer an elegant customer experience. The result is a fragmented technology stack that leads to fragmented customer experiences, delivered by frustrated agents who typically don’t stay on the job very long.” - **Chris Arnold, ASAPP**

By failing to coordinate all objectives, unify all knowledge and data, harmonize systems, brands inhibit their AI solutions’ ability to deliver accurate, timely, productive communication. The absence of cross-departmental collaboration exacerbates the challenge, creating a scenario where businesses struggle to prioritize use cases, analyze results, and drive improvement.

“Imagine, for a second, if we did not proactively govern how AI is deployed. The Sales team deploys AI to their team for the purpose of closing more business. The teams in charge of the website and mobile app are only focused on driving more clicks and deploy a separate AI system to put more personalized offers in front of those visitors. Marketing is focused on conversion rates so they’ve deployed an AI solution to lure potential new customers from competitors, but have no idea what’s going to happen if they’re successful. And then there’s the contact center that sits downstream from all of these standalone, and sometimes conflicting, agendas. Yet another AI solution to help agents resolve more interactions the first time, most likely focused squarely on handle times and survey scores. I hope this paints a picture of the fragmentation that will be born from an AI strategy that doesn’t include cross-functional governance.”
- **Chris Arnold, ASAPP**

REFRAMING THE TECHNOLOGY-HUMAN BALANCE | HOW TO ELEVATE TRUST IN THE AGE OF AI

Capable of uncovering vast insights, scaling personalization, and empowering better performance, AI should be a source of optimism for the contact center. It should let customers know they will have new, faster options for getting what they want. It should let agents know they will have better pathways for completing their work.

The aforementioned pitfalls, unfortunately, bottleneck this optimism. They turn AI into a source of skepticism and worry, sending the message that the brand’s experience will *deteriorate*. Customers end up rejecting self-service as an exercise in deflection, and brands grow fearful that their jobs will either become redundant or needlessly challenging.

What does it take to reverse this negativity and help all customer contact stakeholders celebrate the AI transformation?

“All of this begins by building trust. Trust that AI is positioned to evolve the role of the human rather than eliminate it. Trust that the technology will deliver on its promise with reliability, safety, and security. Trust that despite an antiquated tech stack and a lack of internal AI expertise, I can deliver substantial benefits by pursuing this early in the game. ASAPP is a partner committed to delivering trustworthy outcomes.” - **Chris Arnold, ASAPP**

The following steps will help cultivate trust in AI, unlocking the pathway to a more lucrative, customer-centric balance between technology and humanity.

Make AI the Centerpiece of Your Frontlines, With Humans in the Loop

Today’s AI solutions are capable of understanding and at least partially addressing the majority of customer service inquiries. Let them do that.

Rather than adhering to a model where AI is only available for simple issues and anything complex is instantly escalated to a human, the right approach is to let AI function as the frontline face of the business. Instead of fully taking over all complex interactions, employees play a “human-in-the-loop” role, helping to demonstrate additional empathy or make off-script decisions.

AI continues to *communicate* these outcomes to customers, before creating actionable call summaries and performing vital wrap-up work.

“It’s time to reimagine everything we’ve ever known about customer interactions. Rather than the incremental benefits realized by technology supporting agents, it’s time for agents to support the technology. While the AI is more than capable of having a fluid and realistic conversation with the customer, the human agent can help the AI with important decisions such as deviations from standard operating procedures. Many times, it’s the deviations that make or break customer loyalty. Human agents bring unique value to customer interactions with timely empathy and critical thinking; they can help the AI make these balanced decisions, which results in higher customer satisfaction and long-term business success.”

- Chris Arnold, ASAPP

The market study confirms that organizations are mixed on the best way to balance frontline communication, but this AI-first dynamic is the *most* popular option. There is clear logic for that enthusiasm.

As it boosts efficiency, this dynamic cultivates trust in the AI-powered contact center. Customers will no longer see AI as a deflection option but as their surest pathway to a legitimate resolution. Knowing AI can actually help them at the time and in the channel of their choice, they will finally feel heard and empowered by the brand.

Along with a more fulfilling role (one in which they get to *enhance* connections), agents will benefit from direct visibility into how the AI is working and how conversations are flowing. This elevates their appreciation for the impact of AI technology, while also giving them access to candid feedback about how certain policies and resolutions are resonating.

Be Deliberate about Agent Upskilling

Nearly 59% of customer contact leaders worry that today’s agents lack the skills for next-generation work. Upskilling, therefore, represents a pivotal priority.

It is important, however, to be precise in *what* skills will be required.

Yes, it will be important to cultivate “soft skills.” It will be essential to demonstrate more product mastery and familiarity.

“Human capabilities such as empathy and critical thinking will continue to supplement machines as we shift more of the workload to machines and humans provide supervision, ensuring the unique, personal needs of every single customer are always well cared for.” - Chris Arnold, ASAPP

But these focuses, alone, will not fully optimize the technology-human balance. They will not enable agents to make their best possible contribution as “humans in the loop.”

The best training will prioritize AI fluency. Knowing how to navigate AI interfaces, how to prompt AI for relevant data, and how AI is impacting customer behaviors and expectations will be critical for elevating experiences. They will be able to contribute *humanity* to conversations in the most efficient, customer-centric way possible.

They will also be ready for a future in which human agents may be less involved in “customer engagement” and *more* involved in engineering and experience design.

“Traditional operational roles are giving way to forward-facing AI-engineering roles. These roles will build tomorrow’s AI-native generative agent flows using low- and no-code tooling while leveraging their understanding of the business and its desired outcomes. Quality Assurance analysts will become the testers on new automation flows, ensuring they balance the needs of the customer and the business while proving reliability in outputs. Humans will build and guide the AI towards desired outcomes for the foreseeable future.”

- Chris Arnold, ASAPP

Successful training will also emphasize the fundamental purpose behind a brand and its vision for the customer experience. This sense of why will prove instrumental for agents as they pivot from “reading scripts” to “stepping in for unpredictable, off-script decisions.”

Establish a Cross-Functional AI Governance Team

If the business lacks unity around its AI strategy, investment into high-caliber AI and agent skill development will be for naught.

Establishing a cross-functional AI governance team, therefore, ranks as a critical step on the road to transformation.

“This should be initiated from the C-Suite, typically the Chief Executive Officer or Chief Customer Officer. To maximize the benefits of these AI solutions, we need to eliminate unnecessary impediments to customer satisfaction by ensuring all critical business units are represented and execute in a way that supports optimal customer and business outcomes.” - **Chris Arnold, ASAPP**

By democratizing customer experience priorities and the role AI can play in achieving them, this cross-functional team eliminates the disconnects that have so notoriously inhibited success.

It fosters accurate knowledge and database auditing, helping organizations understand risks of inaccurate or inconsistent communication. It uncovers gaps in the tech stack and agent readiness that could bottleneck AI success. It sets universal metrics that can accurately assess the impact of AI technology.

It, above all, establishes standards for AI technology. With a firm emphasis on the limitations, ethics, security considerations, and quality of AI initiatives, the business can be certain that its AI will *add value* to customer and employee experiences.

Customers will not greet AI agents with a groan of disappointment. Employees will not see AI investment as the enemy of their career security.

They will gain trust from AI. That trust will fuel real transformation.

“Building this framework in advance will take time and effort and will require compromise as each team learns to work together for the benefit of the customer. The oversight committee will govern all decisions related to the AI deployment, ensuring there is consistency and reliability in the customer experience across every touchpoint from retail, web, mobile app, marketing, and contact center to only name a few.” - **Chris Arnold, ASAPP**





Beyond the Buzzword: 4 Non-Negotiables for Empowering Next-Generation Contact Center Agents

“AI will handle simple issues so that agents can focus on complex ones.” “AI will augment rather than replace the human touch.”

Customer contact center leaders are not simply aware of these declarations; they wholeheartedly believe in them. According to CCW Digital research, 95% expect complex interactions to be a cornerstone of the agent role moving forward, and 89% say the same of emotional conversations.

A whopping 60% of leaders, in fact, anticipate agents *almost exclusively* handling this type of work by 2030.

“We expect to see a shift to a more complex customer support and white-glove service. Escalations will involve judgment calls, ethics, empathy, negotiation, or multi-system issues, which are the main areas AI can’t yet master. I expect this may blur the line between support, success, and consulting.” - **Josh Gadberry, Kelly**

Such an outcome would be undoubtedly exciting. It would mean agents could transition from reading scripted answers to engaging in personalized conversations. It would mean contact centers could transform from supporter centers into relationship hubs.

Readiness for this next-generation customer contact function cannot, however, be taken for granted. The simple reality is that today's organizations are *not* sufficiently empowering agents to excel at more consultative, customer-centric work.

What inhibits this culture of empowerment? More importantly, what will it take to overcome these challenges and begin cultivating teams of highly engaged, highly capable "super agents?"

This briefing provides the answers, detailing four non-negotiables for empowering next-generation contact center agents.

INHIBITORS TO EXCELLENCE: WHY TODAY'S AGENTS ARE NOT READY TO SUCCEED

The value of achieving a more productive balance between AI and human agents is undeniable. Present conditions, however, make it unachievable.

As the market study reveals, 69% of leaders worry that their current operational framework is dissuading agents from embracing a pivot to more consultative work.

And employees who are eager for transformation may not be ready for it. Nearly 59% of leaders acknowledge that their agents lack the fundamental skills for next-generation work, and more than two-thirds fear their existing training programs are insufficient for bridging that competency gap.

What is creating this "unempowering" customer contact dynamic? Below, we detail three of the biggest challenges.

High-friction systems and processes

Amid widespread dialogue about reducing customer effort, contact centers are neglecting the consequences of *agent effort*. Today's employees face considerable friction in their day-to-day workflow, and it directly inhibits their ability to reach a new performance standard.

More than 73% of leaders blame inefficient systems, tools, and processes for stunting agent development, and there are clear consequences for the customer experience. Only 22% of consumers feel agents are demonstrating the requisite level of knowledge or focus.

"Poorly integrated systems slow agents down; multiple tabs, jumping between apps, a lack of centralized context, and manual after call tasks reduce productivity. Poor workflow design (bad routing, transfers, duplication of work) will cause further delays and frustration." - Josh Gadberry, Kelly

By automating particularly cumbersome tasks, AI solutions can certainly *help* optimize workflows and reduce friction. The extent of that impact may be muted, however, by existing systemic limitations. Disconnected channels and databases are not conducive to AI solutions, which will be at risk of "amplifying bad data" and ultimately hurting customer and employee experiences.

"AI tools need to be fueled with strong knowledge articles that also provide a bit of 'common sense' response. Too many brands implement AI bots without fully building out their knowledge libraries." - Josh Gadberry, Kelly

Knowledge deficiencies

The majority of leaders do not feel their agents are ready to embrace complex work. They lack the knowledge required for "complex interactions," the deescalation flair required for more emotionally charged conversations, and the sales fluency needed to turn support inquiries into relationship opportunities.

"Many agents aren't sufficiently prepared for today's complexity of customer interactions: products are more complex, customers interact across channels, and expectations are higher." - Josh Gadberry, Kelly

Worse, today's leaders are struggling to address these knowledge and skill limitations.

Home to ineffective training efforts, today's contact centers also lack the unified knowledge bases and "single sources of truth" required for supporting agents during interactions.

Agents, in turn, are left to fumble through convoluted, inconsistent knowledge bases or rely too heavily on supervisor escalations and takeover. In either case, they struggle to deliver an elevated experience on the frontlines and move beyond the "script reader" role that has less value in the age of AI.

Demotivating experiences

As the complexity of work increases, so too does the importance of employee longevity and mentality. It will take highly experienced, emotionally invested agents to navigate challenging, unpredictable calls from demanding customers.

Today's contact centers are not cultivating that caliber of talent. Turnover remains significant, and "buy-in" remains minimal.

“Agents are under pressure, dealing with high volumes, disappointed customers, and repetitive tasks that impact their performance. This leads to high turnover and attrition, which drives down competency and efficiency.” - **Josh Gadberry, Kelly**

Without addressing these factors, organizations will struggle to attract, let alone retain, performers with the necessary skills and sensibility for next-generation work. The agents who interact with customers will ultimately be unsuitable and unprepared for the interactions, leading to frustrating, contentious interactions that only weaken the agent experience – and *increase* disengagement and churn.

4 NON-NEGOTIABLE KEYS TO SUCCESS

The aforementioned challenges are significant and widespread, but they are not insurmountable. By achieving the following four tenets, you can create a contact center environment that uses technology to unlock unprecedented levels of human ingenuity.

You can then create an operational environment that further nurtures that growth, while also keeping employees motivated to thrive in their next-generation roles.

Leverage AI as a Partner to Human Agents

Whereas self-service is an important use case, it is not the only high-value AI opportunity.

By focusing on agent-facing AI – that technology which functions as a real-time *partner* to agent performance and development – organizations will not only improve agent workflow and efficiency but expedite ramp time and strengthen their ability to make lasting connections.

“One of the best applications for AI technology in contact centers is as a partner to human agents, surfacing relevant information, suggesting next steps, or generating draft responses in real time. Leveraging AI in this way can help to shorten call handling times and improve accuracy, especially in complex or regulated environments. Implementing AI tech to enhance rather than replace human agents will result in a more proactive support process, evolve expectations for human agents to provide greater emotional intelligence, and help to standardize white-glove service.”
- **Josh Gadberry, Kelly**

In the immediate term, modern AI solutions can play a role in capturing, analyzing, and unifying customer feedback, summarizing and classifying conversations, auditing knowledge bases, and assessing agent quality.

This will help elevate and unify operational data, customer intelligence, and corporate knowledge. Agents will gain access to higher-caliber, more empowering insights, and thus have a better foundation for engaging in complex, high-stakes conversations.

As organizations begin building the ideal knowledge and data framework, they can leverage *additional AI solutions* to further empower agent performance. This may include everything from real-time sentiment analysis, to “next-best action recommendations,” to live quality monitoring, to simulations and micro-learning opportunities, to noise cancellation. All such solutions will help agents activate automated intelligence and create stronger customer relationships.

Establish New Agent Expectations and Career Paths

Only 13% of organizations believe they have fully fleshed out the future of the agent role. Eight-in-nine contact centers, therefore, expect to achieve meaningful buy-in and skill development based on empty, uncertain speculation.

Such ambiguity inhibits success on so many fronts. Beyond preventing organizations from properly identifying and cultivating the right talent, it also thwarts efforts to achieve meaningful engagement. If agents neither understand the purpose of their role nor how it will evolve and become more lucrative and enriching over time, they have no incentive to devote their buy-in. They have no incentive to go above and beyond in personal development. They have no incentive to share feedback that will spur a more productive transformation.

To avoid this trap and ensure agents are ready, able, and willing to thrive in the new normal, it is critical to precisely define and transparently communicate an agent roadmap. Current and prospective agents should know exactly how their role will develop, both in terms of the types of support inquiries they will handle *and* the “non-support work,” such as bot scoring, knowledge creation, and feedback analysis, for which they will eventually become responsible.

“Create a clear role progression for agents. Show them how they can grow so they are motivated and engaged, and enable and encourage specialization.”
- **Josh Gadberry, Kelly**

Providing this roadmap will not simply help agents self-assess their current capabilities. It will also provide them with a clear answer to the question of “what’s in it for me.”

“Agents need to understand how experience in customer service benefits them in future roles both in and outside of the contact center. Agents are not a disposable resource and are strategic partners of the company in retaining and growing business.”

- Josh Gadberry, Kelly

It is equally pivotal to provide supervisors with a window into their future. How will their role, and the types of employees they have to manage, evolve over time? What will their long-term management trajectory entail? How can they use new technology to enhance their day-to-day experiences?

Define and Cultivate New Skills

With a clearer sense of *what* employees will be doing, leaders can begin focusing on how they will achieve those tasks. Notably, they can more accurately assess the skills and qualities they will need, the current barriers to achieving those skills, and the best ways to close those gaps. From insight into how to enhance training, to recommendations for streamlining systems and interfaces, to guidance on how to refine processes, leaders can construct a contact center that actually empowers agents to excel at next-generation work.

When building next-generation skillsets, it is important to look at the complete picture. Yes, agents will need to more effectively adapt to customer sentiment and demonstrate emotion. They will need to become comfortable engaging in more nuanced, intellectually challenging support conversations. Building empathy and expertise are, obviously, top of mind.

But they will also need to develop *technical* fluency for the AI-powered contact center. Agents will need to excel at prompting AI assistants, and then navigating potential responses, in order to make the most of the “assistance” they will be receiving.

Cultivating this familiarity will not simply boost performance; it will also dissuade fears and reservations about the impact of AI.

“At Kelly, our AI-enabled telephony platform sends the call sentiment and QA feedback directly to agents in addition to leadership. This helps agents become familiar with these tools and, perhaps, feel less threatened by the feedback. Agents must understand how new tech benefits them and their careers. When less complicated requests are handled by technology, there are career growth opportunities for agents to learn higher-level skills.”

- Josh Gadberry, Kelly

Further, they will need to understand the “why” behind certain processes and recommendations. “Complex work” will naturally include scenarios where agents have to make off-script decisions about accepting blame, approving refunds, and pursuing upsell opportunities; without a strong sense of what the business wants to achieve, agents will struggle to make the most of this autonomy.

“Agents perform at their best when they have autonomy supported by clear expectations. Transparent goals, data-driven feedback, and open communication empower employees to take ownership of their success while feeling confident in the organization’s trust.” - Josh Gadberry, Kelly

Training, of course, is not an isolated, one-time endeavor. It is a continuous effort that must be guided by real-time performance data – and actual customer sentiment.

“Don’t treat training as a one-time event. Use coaching and feedback. Monitor performance, provide timely feedback, use call reviews, and metrics tied to quality.” - Josh Gadberry, Kelly

Recommit to contact center culture

Complex conversations are more dynamic and rewarding than repetitive inquiries about missed payments and forgotten passwords. In that sense, the AI revolution will prove instrumental in elevating agent satisfaction.

However, such conversations can also be more intellectually and emotionally draining. Agents will be working harder, dealing with more hostility, and saying “no” to customers who could be dealing with significant financial or medical challenges.

It is essential, therefore, to build a culture that protects agent wellness in the face of this adversity. Using a combination of technology and manual oversight, leaders should be able to identify when agents are struggling with their work and exactly how to reduce the burden.

When agents feel supported, they will demonstrate more positivity during interactions. They will also stay longer, work harder, and think intently about how to collaborate with peers and drive innovation. They will be in the mental place needed to make the most of their elevated skillsets and enhanced technology interfaces.

They will be the “happy agents” who create “happy customers.”

“The ‘super-agent’ culture thrives when flexibility meets clarity; autonomy meets accountability, and performance goals are aligned with human needs. We are building a ‘super-agent’ agent culture where flexibility, empowerment, and purpose drive performance. By trusting our people, embracing adaptive scheduling and remote work while fostering continuous growth, we create an employee experience that fuels engagement, excellence, and meaningful connection with every customer.” - **Josh Gadberry, Kelly**

About Kelly®

Kelly Services, Inc. (Nasdaq: KELYA, KELYB) helps companies recruit and manage skilled workers and helps job seekers find great work. Since inventing the staffing industry in 1946, we have become experts in the many industries and local and global markets we serve. With a network of suppliers and partners around the world, we connect more than 400,000 people with work every year. Our suite of outsourcing and consulting services ensures companies have the people they need, when and where they are needed most. Headquartered in Troy, Michigan, we empower businesses and individuals to access limitless opportunities in industries such as science, engineering, technology, education, manufacturing, retail, finance, and energy. Revenue in 2024 was \$4.3 billion. Learn more at kellyservices.com.
Kelly Services Global | Temporary Staffing & Workforce Solutions
Kelly is an industry leader breaking down workforce barriers—helping people connect with meaningful work, and helping companies find the talent they need.

Final Consideration: A Critical Partner on the Road to Success

To empower performance in the era of AI, all contact centers *must* adhere to the aforementioned four steps.

Organizations do not, however, have to approach them in the exact same way.

The best action strategies account for the individual nuances of each organization. They recognize different levels of AI familiarity. They consider the customer expectations, specialty skillsets, and compliance requirements that are unique to their industry.

Kelly helps organizations achieve this more specialized form of transformation.

“Our approach is intentionally designed to balance standards with localized specializations to create tailored solutions for our clients. Kelly combines industry expertise, customize frameworks tailored to client goals, use data-driven insights for realistic execution, alignment of strategies with customer needs, and continuously refine performance through feedback and market intelligence to stay agile in evolving business environments.”
- **Josh Gadberry, Kelly**

To learn more about Kel and its CX solutions from Kelly, visit Kelly BPO.



Technology for Humanity: Perfecting the Human-CX Journey

The contact center industry is uniquely human. It is centered around solving problems, connecting with customers and delivering an impactful resolution. As we see technology enter space, however, our expectations have started to evolve.

AI has forced organizations to shift their mindset and invite technology into a historically human-centered picture. Technology versus humanity has become a major point of contention for individuals who are struggling to understand this path forward.

However, it does not need to be an either or debate, AI is a major player in optimizing, improving and *enhancing* humanity.

“The theme ‘tech vs. humanity’ presents a false choice. We see it as ‘tech *for* humanity.’ The goal of innovation isn’t to replace the human element, but to unburden it. We work with clients to leverage AI as an augmentation tool for their staff,” states John Finch, Global Vice President of Product Marketing, Industry Solutions & Platform at RingCentral.

This market study sheds light on the unique capabilities of both human agents and the tools that support them. As organizations break down barriers and establish a strategy that includes both the human and technology, customers benefit from comprehensive and personalized experiences.

Getting this balance right is not easy, but it is essential. By bringing together technology and humanity in a meaningful way, organizations will be in the position to thrive. CCW is thrilled to partner with RingCentral to share insights on the future of the agent role and technology *for* humanity, not against it.

ARE WE STRUGGLING TO STAY HUMAN?

Organizations are often working to achieve conflicting priorities. Customers want better, faster support but a more dynamic conversation. They want seamless interactions with human connection. These objectives are evident in CCW Digital research, 91% of leaders stated that it is important to exceed customer expectations when it comes to the empathy and humanity of interactions. Yet, 85% also stated that they want to see 24/6/365 support.

Achieving humanity and empathy at scale can seem counterintuitive. Personalized support is meant to be individualized and meaningful, something that should be delivered by an expert agent. But, brands are also navigating immense pressure to do more, establish more efficient and streamlined interactions.

For contact center leaders, this balance is incredibly challenging. Lean too much in one direction and they will be criticized for robotic interactions, the other and you have long wait times, added friction and frustrated customers.

To better understand how to navigate this balance, it is critical to pinpoint what makes both a human-centered and AI-powered interaction work. According to CX leaders the unique benefits of human agents are the ability to demonstrate emotional empathy, understand urgency, explain complicated ideas in simple terms and go above and beyond for customers.

Leaning into these qualities, then, is key when mapping out where the human fits into the equation.

As we look ahead, it is essential to build a strategy that includes these human elements while inserting the efficiency and seamlessness of an AI-powered interaction. Once leaders can leverage AI effectively, and remove many of the efficiencies agents continue to deal with, they can more easily tap into the human approach.

Simple Work Isn't So Simple

While it is certainly exciting that AI has the potential to take on simple tasks, many organizations have not been able to secure these wins just yet. According to CCW Digital research, 74% of contact center leaders stated that there is too much friction in the current systems, tools and processes. This prevents agents from quickly excelling at more complex and consultative work.

"Today's agents are burned out from high workloads and toggling between a dozen disparate applications just to find one answer. We navigate this balance by applying AI to solve specific, frustrating pain points," shares John Finch.

This challenge is not just a product of complicated technology, it also stems from customer needs. Today's customers are still requesting a human agent even for simple tasks, forcing them to consistently focus on interactions that could be easily resolved in self-service channels.

CCW Digital research confirms that 68% of customers are quick to demand escalation to an agent during self-service interactions.

This over-reliance on agents forces employees to keep focus on simple tasks, hindering their growth in the role and ability to pivot to complex work. By giving customers access to tools that seamlessly solve their problems, organizations can better balance this workflow.

"Our AI-powered self-service tools (like AI Agents) handle the high-volume, low-complexity inquiries ("what's my balance?"), which frees human agents to take on the more complex, empathetic, and high-value work. This elevates the agent role from a rote-response script-reader to a true brand ambassador and problem-solver," Finch states.

From Augmented to Empowered

As leaders work to redefine the agent role, it is critical to move beyond just shifting workflows and actually empowering agents to take on next-generation work. To do this, leaders must start by supporting agents effectively.

RingCentral defines three key areas that technology can best support the agent workflow: real-time in-call support, post-call coaching and development and agent empowerment and scheduling.

Real-Time In-Call Support: The agent no longer has to hunt for information.

- AI Agent Assist is critical. It provides agents with real-time transcripts of the call, automatically surfaces answers from synced knowledge bases (including Google Drive folders), and even provides AI-driven Suggested Responses and AI Checklists based on the conversation's intent. This eliminates the agent's need to search for answers, reducing handle times and customer frustration.

Post-Call Coaching and Development: We're moving from random, 1-2% call sampling to 100% analysis.

- AI Quality Management automatically scores 100% of interactions based on metrics that matter, like sentiment, patience, and engaging questions.
- AI Interaction Analytics can predict CSAT on 100% of calls, not just the fraction of customers who fill out a survey. This gives supervisors targeted, actionable data to coach agents on specific behaviors, not just generic feedback. It also provides AI-powered dashboards to track customer intent, issues, and retention risks.

Agent Empowerment and Scheduling: A supported agent is a happy agent.

- AI Workforce Management (WFM) tools empower agents with self-service features like shift bidding and shift swaps. This gives them control over their work-life balance, which is a massive driver of morale, engagement, and retention.

In giving agents the tools and technology to succeed, organizations are empowering the next-generation of agents. As customer expectations continually increase, it is essential to provide agents with everything they need to not just address customer concerns but meet their underlying needs. When reimagining the agent role, it is this attention to detail and deep expertise that will help agents thrive.

The Future of Training and Development

Once organizations are in the position to better support agents with the right tech, they also need to ensure they are prepared for the work ahead. As agents take on more complex conversations and spend time engaging with customers, they must have the skills to exceed.

This goes beyond just new tasks, the agent role as it stands will fundamentally shift. Therefore, it is critical to upskill employees and provide them with the resources to improve.

Finch shares that agents are moving away from being knowledge finders to become problem solvers. "Agents no longer need to memorize or search through a thousand KB articles. The AI does that. Training must now focus on complex problem-solving, critical thinking, and negotiation. The agent is the escalation point for the AI, and they must be equipped to handle the nuanced, gray-area issues that self-service can't," he states.

According to CCW Digital research, as high as 85% of leaders say that humans will have to demonstrate more expertise and mastery of products and processes. This mastery will certainly be supported by tools like agent assist and next-best action recommendations but it also needs to be instilled through consistent training and development.

This can be achieved through data-driven coaching. By using tools like AI quality management and interaction analytics, supervisors can get a meaningful look at where agents need more training and improve performance quickly. "Their job is no longer about randomly listening to calls. It's about interpreting sentiment data, AI-driven scorecards, and intent analysis to provide highly specific, targeted coaching that actually improves performance," Finch states.

Beyond just the subject, agents must also master human skills as well. With customers enabled to self-serve for simple tasks they will be expecting more when they choose to engage with a human. These interactions will need to be driven by empathy, critical thinking and active listening. Agents must be able to de-escalate customers and meet their needs amid heightened emotion and frustration. These skills are innately human and something customers will continue to seek out.

Looking Ahead: Next-Steps for Agent Success

This market study is focused on technology versus humanity, a theme that continues to present itself in the contact center space. While it is presented as a debate, it is clearly a collaboration. The agent role is poised to change — it will evolve as technology shifts the workflow. But, this is not grounds to write off the importance of the human.

Agents are an integral piece of the CX equation, and preparing them for the future is critical. As organizations begin their AI journey it is essential to include the agent in this path forward. Being transparent about how the role will change, where agents fit in and how the work might look is important.

It is also critical to take the journey at the right speed. “First, don’t try to boil the ocean. The most successful AI journeys start by identifying one or two critical business challenges—like high agent workload, long resolution times, or inconsistent service quality—and applying AI that is purpose-built to solve those specific pain points,” shares Finch.

By making intentional moves, organizations will build a foundation for long-term success. Technology can be such a powerful tool, but if it is not implemented effectively it will not add value to the agent or customer experience.

As leaders look ahead, they must focus on the people, process and technology. By taking a holistic approach, organizations will establish an effective balance across the board.

Company	Challenge	Solution/Result
The Escape Game	The company was rapidly expanding, and its old contact center solution couldn't scale. It suffered from unreliability, high costs, and a lack of analytics, failing to support their "Guest Experience" focus.	Deployed RingCX, which cut costs by 50% while improving reliability. Used skills-based routing and AI-powered analytics to gain 100% visibility into team performance and enable a remote workforce, handling 40,000+ calls/month with 96% agent satisfaction. They also boosted their answer rates by 16%, which led to a 7% increase in bookings.
EVP Eyecare	Rapid acquisitions resulted in 20 different, inconsistent phone systems. This created "islands" of agents, inconsistent callback options, and no centralized way to manage or analyze patient interactions.	Standardized on RingCX, unifying all teams on one platform. This immediately enabled a consistent callback feature for 60% of the business, decreasing hold times and abandonment rates. The intuitive supervisor dashboard and analytics engine eliminated the need for a separate data warehouse.
Novatech	A legacy, on-premise system across 13 locations was disjointed and lacked modern features. Agents couldn't provide personalized service, and supervisors had no way to analyze performance.	Moved to RingCX, providing a unified platform. AI Interaction Summaries decreased after-call work time by 43%. As a result of these streamline workflows, agents are now able to handle 20% more calls per day. AI Quality Management saved supervisors 70% of the time they previously spent locating calls for review, allowing for more impactful, targeted coaching.



Your Framework for AI-Driven Continuous CX Improvement

How real-time alerts and feedback loops drive transformational agent and customer outcomes

INTRODUCTION

For years, manual quality assurance (QA) methods like random call sampling and periodic agent coaching ruled the contact center. Many teams still operate using these methods, but they're challenged to keep pace with modern customer experience (CX) expectations and increasing workloads.

According to [McKinsey](#), 71% of Gen Z believe live calls are the quickest and easiest way to reach customer care and explain their issues. For baby boomers, this number rises to 94%. Overall, call volumes and interactions demanding human response are on the rise – 57% of customer care leaders expect call volumes to increase over the next one or two years.

At the same time, organizations can leverage AI to empower overwhelmed contact centers and CX teams, helping them to do more with less – or even identify the best interactions to automate. According to the [CallMiner CX Landscape Report](#), 91% of contact center and CX leaders think that AI technology will improve efficiency when optimizing CX strategies.

Today, 46% use real-time guidance during customer interactions. That's where a massive opportunity comes in. Real-time, AI-powered conversation intelligence can fuel a continuous improvement cycle across people, processes, and interaction channels.

Let's explore how real-time conversation intelligence can continuously improve both customer service and experience.

THE CHALLENGE: STATIC CX IMPROVEMENT MODELS

Today's static CX improvement models unfortunately can't keep up with the 24/7, 365-day-a-year demands of the modern customer. Take, for example, post-interaction customer feedback methods, such as surveys or reviews. These are reactionary, lagging indicators that are often incomplete and delay understanding customer experiences, often resulting in even more frustration and poor outcomes.

What's more, many contact centers rely on inconsistent manual coaching that varies widely depending on the manager, site, or team. Coaching is rarely based on 100% of customer interactions. Instead, managers and supervisors often rely on a random sample of customer interactions, which prevents data-driven, objective agent coaching.

In addition, many agents lack effective real-time support. For example, they may not be getting targeted, real-time alerts that can help them navigate challenging customer interactions and compliance scenarios in the moment. As a result, supervisors can become overwhelmed by escalations and compliance oversight, leading to burnout all around.

FROM INSIGHT TO ACTION: A MODERN APPROACH TO CONTINUOUS IMPROVEMENT

The new model for CX improvement combines AI-based conversation intelligence technology with in-the-moment agent support. The result is a better, more holistic feedback loop: Post-call insights inform real-time alerts, which improve agent behavior, which improve customer outcomes. Rather than relying on calls alone, organizations can integrate conversation intelligence across channels including voice, chat, email, social media channels, and more.



THE POWER OF REAL-TIME CLOSED-LOOP INTERACTIONS

Conversation intelligence can play a big role in solicited feedback, such as surveys and post-interaction outreach, making these communications more targeted, personalized, and relevant to customers. In the past, by the time a customer completed a survey, it was too late to fix an issue – it's reactionary. Closed-loop, real-time feedback changes that.

AI technology in conversation intelligence analyzes customer conversations as they happen, enabling immediate action when something goes wrong or right. This means:

- Frustrated customers get proactive resolution, not just a follow-up survey
- Positive moments trigger smart outreach, rewards, or reviews while the experience is fresh
- Teams can continuously improve based on actual conversations, instead of guesswork

The result? Faster resolutions, stronger customer trust, and a voice of customer (VoC) program that actually drives loyalty.

Read more about this approach in another whitepaper: **The Future of Omnichannel CX in 2025 and Beyond.**

REAL-TIME IN ACTION: PENNYMAC'S ITERATIVE ROLLOUT AND EVOLUTION

When **PennyMac** set out to implement real-time alerts as part of its conversation intelligence program, it did so with a clear objective: to build consistency across every customer interaction. Drawing inspiration from brands like Chick-fil-A and Disney – companies known for delivering reliably positive experiences – PennyMac wanted to ensure that no matter the channel, agent, or touchpoint, every borrower received the same level of service. That meant building both consistency in how information was communicated, and also the emotional tone and overall journey experience.

PennyMac began by leveraging post-interaction conversation intelligence to uncover pain points across its servicing and sales divisions. High-risk call scenarios – such as unexpected escrow payment increases – emerged as top priorities.

These interactions were often emotionally charged and difficult for even experienced agents to manage. From there, the team mapped out real-time alerts based on regulatory requirements, customer sentiment indicators, and escalation triggers like, “I want to speak to a manager.”

Rather than rushing a full rollout, PennyMac took a phased and deliberate approach. The initial pilot involved just 10 to 15 agents from a single division, allowing the team to gather a meaningful sample size without overwhelming operations. Alert frequency was intentionally limited at the start – only 8% of calls triggered alerts – to minimize fatigue and allow agents to adapt to the new workflow. Over time, as comfort and effectiveness grew, PennyMac increased that percentage incrementally. At last count, real-time alerts were firing on more than 65% of all calls, with strong agent adoption and positive outcomes.

Most importantly, PennyMac didn’t treat alerts as one-way instructions. They used them as part of a broader culture designed to guide and encourage agents. For example, when agents responded to a difficult situation exactly as intended, an “affirmation” alert would appear – providing instant, positive reinforcement. If an agent missed an important step, a “missed” alert would fire 30 seconds later, offering a gentle reminder to return to the required phrasing or next best action.

Initially, PennyMac considered using click-through rates on alerts as a measure of success. But through the rollout, they realized that tracking clicks alone wasn’t meaningful, since an agent might click an alert and still fail to apply the correct behavior. Instead, they refined their success metrics to focus on behavioral outcomes. Did the agent say what they were supposed to say? Did they follow the correct script in a regulatory scenario? These were the questions that mattered.

The shift away from clicks and toward outcomes was pivotal. It allowed the team to continuously refine the alert system, measure its real impact on customer experience and compliance, and build a true closed-loop system of improvement. When an alert’s behavior adherence reached 100%, it could be sunset, and a new priority could take its place.

Through this methodical, data-driven approach, PennyMac transformed real-time guidance from a tool into a system that learned, adapted, and improved with every interaction.

SCALING ACROSS THE ENTERPRISE: LESSONS FROM SUCCESSFUL REAL-TIME DEPLOYMENTS

Ideally, teams can translate real-time guidance into measurable business outcomes, both in and outside the contact center. These examples show how smart alerts and strategic rollout can drive both agent effectiveness and business performance.

- **Kelsey-Seybold**, a leading medical clinic, turns post-contact conversation intelligence into real-time action. The contact center team leverages real-time alerts for patient safety purposes. For example, agents triage customer interactions mentioning health issues that require immediate physician intervention, such as chest pain. These alerts not only improve agent confidence, but also can save patients’ lives.
- Customer experience leader **Foundever** leverages conversation intelligence in collections with real-time nudges. For one major telecom client, the team built a targeted set of alerts across empathy, compliance, and knowledge use. In a pilot vs. control test, they increased dollars collected per productive hour by \$41.14 — proving that real-time guidance can both lift KPIs and create a scalable, repeatable model for improvement.





BUILDING A CONTINUOUS IMPROVEMENT FRAMEWORK WITH AI

Transformational CX doesn't happen by accident – it's the product of a deliberate, repeatable system. By combining post-interaction analytics, real-time agent guidance, and behavioral feedback loops, organizations can turn every conversation into a learning opportunity. Below is a five-step framework for using AI-powered conversation intelligence to embed continuous improvement into your contact center operations.

STEP 1: DIAGNOSE WITH POST-INTERACTION ANALYSIS

The first step is understanding where problems actually begin. Post-interaction analytics help organizations uncover the leading drivers of churn, complaints, escalations, and regulatory non-compliance. By analyzing these historical interactions at scale, teams can identify which scenarios consistently lead to poor outcomes or where agents regularly struggle – and which moments offer opportunities to improve. This insight becomes the foundation for designing targeted interventions.



STEP 2: DESIGN TARGETED REAL-TIME ALERTS

With the “why” in hand, the next step is to act in the moment. Real-time alerts provide agents with just-in-time guidance when it matters most. The key is to align across the business on what “good” looks like, including scripting, tone, timing, and escalation paths. Prioritize alerts by impact: regulatory risks, customer emotion, agent morale, and revenue opportunities like sales effectiveness.

To avoid alert fatigue, start with a small number of critical alerts and expand gradually. Assign alert types by agent experience level or line of business. For example, new agents may need more structured guidance, while tenured agents benefit from nudges or quick-reference links.

STEP 3: DRIVE AGENT BEHAVIOR THROUGH ITERATIVE TESTING

Real-time alerting requires testing, refinement, and agent feedback to ensure it's driving the intended behaviors. Begin with a small pilot group to assess how alerts are being received and used. Monitor for alert frequency and clarity of messaging.

To reinforce desired actions, layer in affirmation alerts (for when agents get it right) and “missed” notices (gentle reminders when something is overlooked). These tools build agent confidence while driving consistency.

STEP 4: MEASURE WHAT MATTERS

Rather than tracking surface-level metrics like alert volume or click rates, focus on outcomes. Are agents applying the correct behavior after an alert fires? Are KPIs – such as resolution rates, sentiment scores, or compliance adherence – improving?

Organizations should analyze success rates by alert type, agent group, and business line. Alerts with high adherence may be scaled further. Others may need to be refined, or even retired, to keep guidance focused and relevant.

STEP 5: CLOSE THE LOOP

The final step is to make real-time guidance part of a broader improvement cycle. Insights from alert performance should inform ongoing agent coaching and training, QA programs, and new alert development.

Additionally, organizations can layer in closed-loop interaction tools that use conversation intelligence to take immediate action – such as triggering a survey follow-up, issuing a credit, or escalating a service failure – in response to a specific moment in a customer interaction.

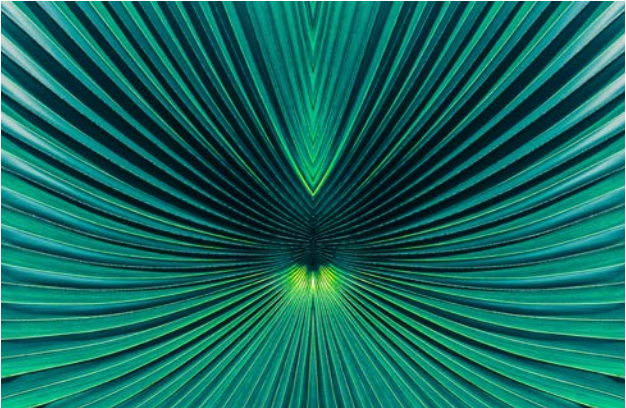
This loop ensures that insights translate into action that improves outcomes for both customers and agents alike.

THE STRATEGIC ADVANTAGE OF AI-DRIVEN CX FEEDBACK LOOPS

By embedding AI into a continuous feedback loop, organizations can move from reactive fixes to proactive, real-time improvements. The benefits go far beyond efficiency – this approach creates a foundation for long-term customer loyalty and operational scale.

The results include:

- Faster learning cycles
- Reduced compliance risk
- More consistent, emotionally resonant experiences
- Improved customer loyalty and retention
- Scalable across roles, geographies, and verticals



CONCLUSION: AI AS A CATALYST FOR CX TRANSFORMATION

AI foundation for building smarter, more resilient organizations. When paired with real-time guidance, it enables contact center and CX teams to turn everyday conversations into opportunities for growth. Instead of reacting to what went wrong, companies can anticipate customer needs, standardize best practices, and coach agents in the moment.

This shift empowers agents, aligns teams, and transforms CX into a living, evolving system. With the right framework, continuous improvement is built into the rhythm of every call, message, and customer interaction.





Making AI Measurable: A Framework for Where to Start and How to Prove It Worked

1. EXECUTIVE SUMMARY

Artificial intelligence has become a strategic imperative for enterprises. Organizations are under intense pressure to automate tasks, increase productivity, and modernize workflows. Investment in AI is skyrocketing, but results often remain elusive. Too many initiatives move forward without clear baselines, targeted strategies, or reliable ways to measure whether the technology actually works.

The consequence is a growing gap between AI ambition and measurable business outcomes. Leaders know they need to act, but they don't know where to start, what to improve, or how to prove that their investments are paying off.

To close this gap, organizations must rethink their approach. Rather than launching AI projects based on hype or vague goals, they need a structured model: First, understand the baseline of how work actually gets done today. Then, apply targeted strategies to the specific metrics that matter most. Finally, measure whether those metrics have actually improved over time.

This white paper outlines a practical framework for making AI measurable—and introduces how 8Flow enables organizations to operationalize it at scale.

2. THE CURRENT LANDSCAPE:
THE MISSING FOUNDATION

The AI Imperative

Nearly every enterprise is investing in AI, but most leaders still face the same foundational challenges. They know they need to improve performance and modernize workflows—but they don't know where to begin. Projects often proceed without clear problem statements, success metrics, or baselines to measure against.

The Metrics Gap

- Unclear Baselines: Teams lack visibility into how people actually spend their time or how workflows are structured.
- Fragmented Data: Metrics live in disconnected systems, making it difficult to form a unified picture.
- Misaligned Initiatives: AI deployments target generic goals rather than specific, measurable outcomes.

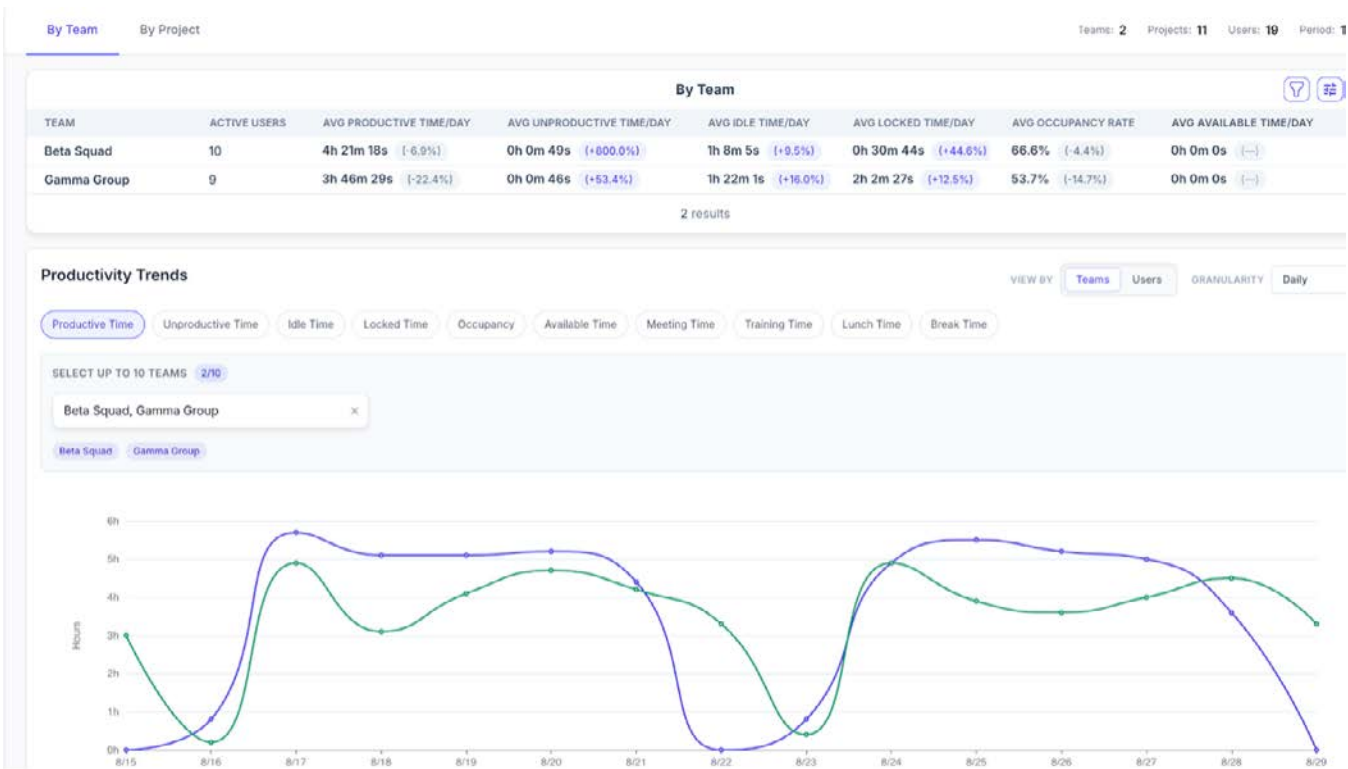
Baseline Metrics That Matter

Before applying AI, organizations need to understand their current state in concrete terms. Two categories of operational metrics provide the clearest picture: agent productivity and workflow efficiency.

Agent productivity metrics reveal how time is actually spent by the workforce. This includes productive time per day, locked or idle time, time spent in meetings or breaks, and schedule adherence. Together, these metrics provide a granular view of where effort is focused—and where it's lost.

Workflow efficiency metrics expose friction within processes themselves. They cover factors such as the number of workstreams agents touch, average handle time, hours spent on manual tasks, and the number of systems required to resolve a case. These measures help leaders see not just how people work, but how work moves through the organization.

Figure 1: Example Baseline Metrics Dashboard — Agent Productivity



3. A NEW MODEL FOR AI IMPACT

To turn AI from a vague ambition into a measurable driver of business value, organizations need a clear model. Instead of deploying technology and hoping for results, leaders should follow a structured process that starts with visibility, moves through targeted action, and ends with measurable impact.

This model can be understood in three simple boxes: Before → Strategy → After.

Figure 2: Three-Box Framework — Baseline, Strategy, Impact



1. Before — Establish the Baseline

- Identify how agents spend their time.
- Pinpoint workflow inefficiencies and unnecessary complexity.
- Establish clear benchmarks for improvement.



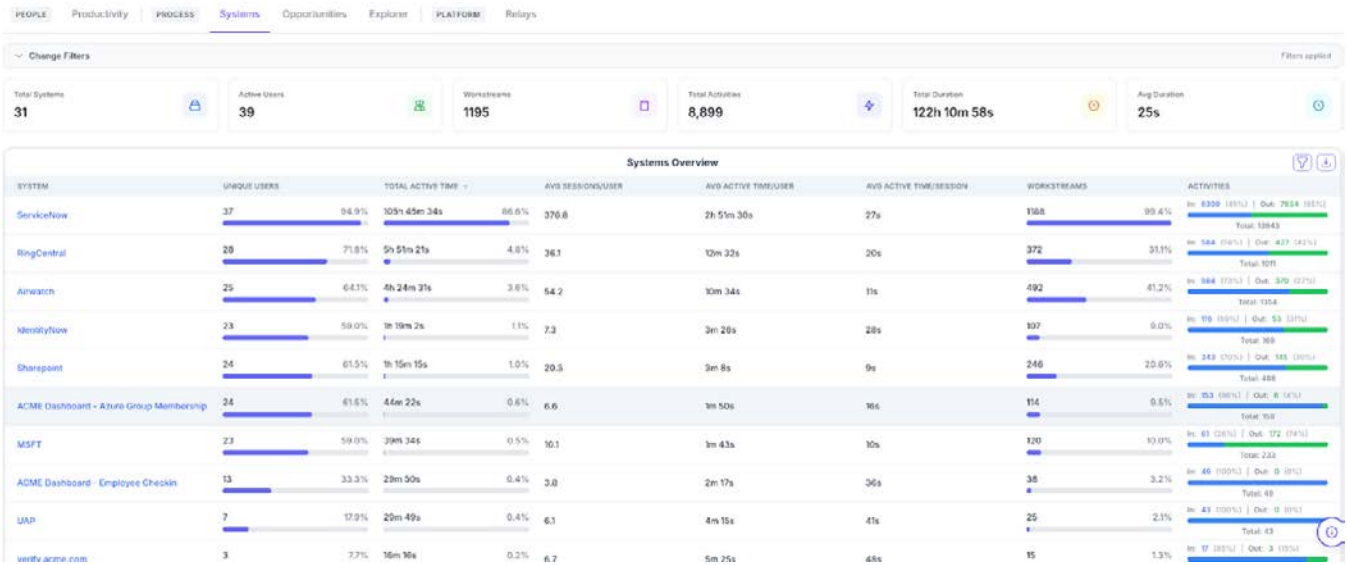
2. Strategy — Target the Right Levers

Once the right metric is identified, leaders can apply targeted strategies to improve it. These strategies vary by context, but typically fall into a few powerful categories: integrate systems more tightly, build an AI agent to automate repetitive tasks, coach agents more effectively on best practices and processes, implement real-time analysis to monitor productivity and intervene early, and remove unnecessary systems to streamline workflows. The key is to focus on the specific lever that will improve the chosen metric—whether that's reducing idle time, shortening handle time, or cutting manual work. By aligning strategies to data, organizations can act with precision rather than hope.

3. After — Measure and Prove Impact

The final step is to track whether the chosen metric actually improved. Rather than relying on anecdotes or lagging indicators, organizations should measure the exact same metric after applying the strategy. Track changes over time through dashboards and reports, quantify ROI in terms of time saved, productivity gains, or reduced system complexity, and identify which strategies deliver the highest impact to scale them across teams.

Figure 3



4. HOW 8FLOW WORKS

Most AI initiatives fail not because the technology doesn't work, but because organizations lack a structured way to see, act, and prove. 8Flow was built to close this gap. It provides the visibility, strategic guidance, and measurement framework needed to turn AI investments into tangible outcomes.

4.1 Visibility: A Single Source of Truth

Most enterprises lack a clear picture of how work actually happens. Data is scattered across tools, productivity reports, and anecdotal feedback. 8Flow changes this by observing agent activity across systems in real time and consolidating it into a single operational view.

Leaders can see not just how much time agents spend working, but where that time goes: which systems absorb the most time and effort, where agents get stuck or idle between tasks, and which workflows rely heavily on manual steps that could be automated. For example, 8Flow might reveal that agents spend 30% of their day switching between three legacy systems—two of which could be consolidated or eliminated entirely. This level of visibility surfaces hidden friction points and uncovers process improvement or automation opportunities.

4.2 Focus: Choosing What Matters

Once the baseline is visible, the key is focus. Rather than tackling everything at once, 8Flow helps leaders identify the single metric or workflow bottleneck that will drive the most impact. In some cases, that means reducing locked or idle time. In others, it might mean consolidating systems or automating repetitive workflows.

By surfacing where time is spent, where processes break down, and where automation applies, 8Flow enables leaders to make strategic choices rooted in data. This step transforms visibility into direction, with clear goals such as “automate 20% of manual steps” or “remove one system from the resolution flow.”

4.3 Strategy: Data-Driven Recommendations

With a focus area selected, 8Flow surfaces targeted strategies tuned to the actual workflow. It highlights which actions will likely move the needle—for example, tighter integrations, AI agents handling repetitive tasks, smarter coaching, or removing system bottlenecks—so teams can move from insight to execution quickly, without lengthy manual analysis.

4.4 Proof: Tracking Results Over Time

8Flow closes the loop by continuously measuring the selected metric after changes. Leaders can see performance trends, compare baseline vs. post-intervention, and quantify ROI confidently. This allows organizations to scale what works and pivot quickly if a strategy underperforms.

Figure 4: Example Before & After Metric Visualization



5. CASE EXAMPLE: OP360

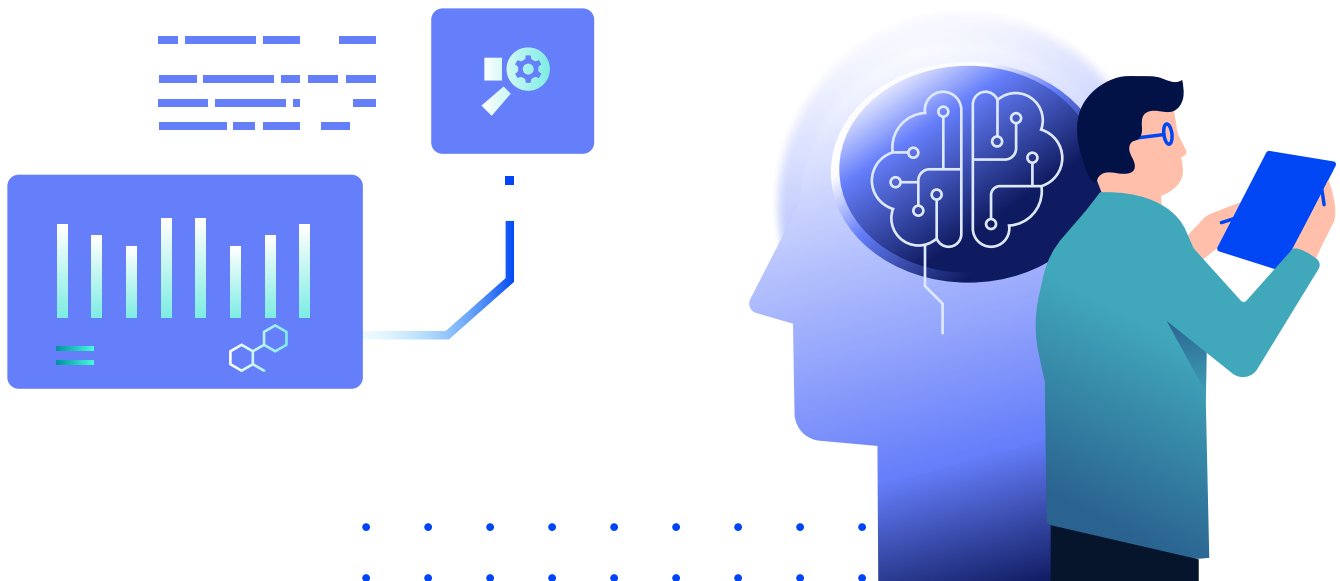
The OP360 deployment illustrates how the three-box strategy works in practice. By establishing a clear baseline, OP360 uncovered exactly where agent time was being lost—across fragmented systems, manual searches, and inconsistent knowledge base usage. This visibility allowed them to pinpoint locked and idle time, highlight redundant workflows, and identify tasks that were ideal candidates for automation.

Armed with these insights, OP360 applied targeted strategies: introducing real-time analysis to monitor productivity, updating knowledge base content, coaching agents to reduce unnecessary steps, and implementing two lightweight automations. These levers delivered measurable impact within six weeks: an **11% increase in agent productivity** driven primarily by real-time analysis, **14% more chats closed**, and **1.33 hours saved per agent per month through automation**. By linking clear baselines to focused action and measuring results over time, OP360 proved how quickly AI investments can translate into operational gains.

6. CONCLUSION & NEXT STEPS

AI ambition without measurement is risk. Organizations may adopt cutting-edge models or agents, but without clarity into where and how they will move the needle, those investments often yield ambiguous results.

This white paper has shown a three-box framework—baseline, targeted action, measurable impact—that bridges the gap between ambition and outcome. The OP360 case illustrates that this approach isn't theoretical; it delivers double-digit gains in weeks. If you're ready to move from guesswork to insight, 8Flow can help. Consider a pilot deployment to begin measuring, improving, and proving AI in your own organization.





Beyond Automation: Where Agentic AI Meets Human Empathy

Redefining CX Through Flexibility, Precision, and Empathy

EXECUTIVE SUMMARY

Customer service is entering a new phase. Automation is finally good enough to take on the repetitive work, but customers still judge brands on how they are treated in the hard moments. The future belongs to leaders who can run both at once.

Liveops has been doing that for 25+ years by pairing on-demand, brand-aligned customer support professionals with a precision-scheduling operating model. Now we are extending that model with agentic AI and AI-powered agent assistance so that every interaction can be fast, empathetic, and measurable.

“Tier-1 automation is accelerating, but empathy isn’t automatable,” said Molly Moore, Chief Operating Officer at Liveops. “Enterprises need both: AI that resolves simple tasks and agents who can de-escalate, retain, and grow relationships. Liveops brings those worlds together.”

Liveops approaches AI with one priority—keep the human interaction strong and let technology clear the path forward. The next era of CX won’t be defined by technology itself, but by how intelligently we combine it with human judgment.

AI AS A FORCE MULTIPLIER, NOT A SUBSTITUTE

A lot of the market is still talking about AI as if it will replace agents. We don't believe that. What we are seeing across programs is that AI is most valuable when it is supporting the agent, not competing with them.

At Liveops, AI isn't a project—it's a design principle. We're using it to anticipate intent, route with precision, and assist in the moments that matter most for quality and compliance:

- Designing AI to anticipate intent and route work to the right person at the right time.
- Piloting AI agent assistance in the moments with the greatest quality and compliance impact.
- Expanding automation where the brand experience will not suffer.

How Liveops can apply this to real customer interactions:

- AI can prepare a customer snapshot so the agent can start warmer and faster.
- AI can suggest language that protects the brand voice and calms tense situations.
- AI can draft the follow-up so the agent is not spending time on notes.

That's practical AI—built around the reality of service work.

THE MODERN AGENT: TECH-ENABLED AND HUMAN-CENTERED

The people within the Liveops network are not sitting in a row of cubicles waiting for calls. They are skilled, often industry-aligned customer support professionals with an average of 15 years of work experience, and 80% are college educated. Our job is to give them the context, guidance, and schedule design that lets them show up as the best version of themselves.

“Winners in customer experience will not be AI only or human only; they will be AI-accelerated and human-centered,” said Jim Watson, Chief Executive Officer at Liveops. “Enterprises want one partner that can operationalize AI responsibly for tier-one work and stand behind human quality when stakes are high, and Liveops is that partner.”

That's our point of view: AI-accelerated, human-centered. Not AI-first, not people-only.

WHY LIVEOPS' MODEL MATTERS IN AN AI ERA

The Liveops model delivers what modern CX demands: scalability powered by AI, efficiency through data, and human talent perfectly aligned to each brand.

- **Precision Scheduling:** Because Liveops schedules agents in 30-minute intervals—compared to the traditional 4-to-8-hour shifts, brands can match coverage to actual demand instead of paying for hours of idle time. AI makes those forecasts sharper; our model makes them usable.
- **AI Shifts the Work Upward:** As AI takes over simpler, repeatable contacts, the human work that remains is higher value and harder to cover. A virtual, on-demand model like Liveops attracts experienced, brand-aligned agents to handle those complex, emotional, or regulated interactions without a large, fixed team.
- **Brand-Aligned Agents:** AI can keep knowledge current, but it cannot create a human-to-human interaction that sounds like your company. That's why talent is selected for brand alignment and relevant industry experience.

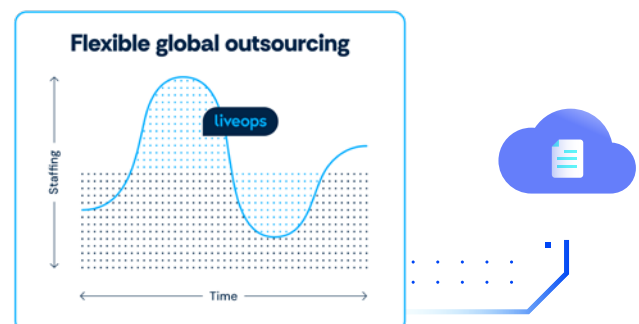
That mix is harder for traditional, facility-bound providers to tell convincingly. It's built into the DNA of Liveops.

The next phase of Liveops innovation is already underway—using AI to make every interaction not just faster or cheaper, but smarter, safer, and more human.

WHY LIVEOPS?

Customer service is at its best when technology clears the way and people carry the relationship. That is the idea running through this paper, and it is the way Liveops already shows up for brands.

Liveops brings three things together in one place: AI that takes care of the repeatable work, an on-demand network of professionals who can handle the conversations that matter, and an operating model that makes performance visible. The result is simple. Empathetic customer experiences at scale, without losing the human touch.





Technology vs. Humanity Misses the Point: The Future of CX Is Human + AI Working as One

The technology-versus-humanity debate has become an unhelpful cliché. Each new wave of innovation seems to deepen nostalgia for “the human touch,” and recent experiences with in-progress AI Agents have validated customer skepticism. This year, the top source of customer frustration wasn’t price, wait time, or product complexity. It was simply *difficulty reaching a live agent*. Customers want assurance that their needs will be understood and their voices heard.

But framing the future of customer experience as a tug-of-war between technology and humanity obscures what is actually happening in modern contact centers. Human service and AI service are no longer separate lanes.

They form a hybrid system where every customer journey is shaped by a sequence of micro-interactions between humans, AI agents, and the underlying knowledge and processes that connect them.

The question isn’t whether customers want humans *or* AI. The question is how organizations will design and manage a frontline environment where both operate together, continuously, and often invisibly, to shape the experience.

CX IS NOW A CHAIN OF HUMAN + AI INTERACTIONS

Across voice, digital, and self-service channels, today’s customer experience is not defined by a single conversation but by the *cumulative choreography* of dozens of handoffs, escalations, fallback moments, assists, and recommendations produced jointly by humans and machines.

Here's an example:

A customer attempts self-service → an AI agent triages → the human associate receives context from an assist model → the AI retrieves policy language → the associate interprets ambiguity → the AI summarizes the outcome and enters it in an CRM → a human associate references this as they kick off the customer's next call.

None of these steps exist in isolation. And together, they *are* the customer experience.

Yet most organizations still manage these interactions as if they were separate worlds, with AI governed by one set of tools and teams, and human performance managed entirely differently. This organizational divide is the real risk. Not the technology.

THE MISSING LINK IS CHANGE MANAGEMENT FOR HYBRID WORKFORCES

If technology and humanity is the path forward, the critical capability organizations lack is change management that spans both. The future agent role, human or AI, looks increasingly less like the past. Human associates will increasingly oversee, partner with, or review AI systems. AI agents will shoulder simple tasks, escalate to human partners, and require continuous tuning.

To make this work sustainably, organizations must treat the hybrid frontline as a single unit. This requires:

1. UNDERSTANDING THE REAL CUSTOMER JOURNEY, NOT AN IMAGINED ONE

Too many AI initiatives begin with theoretical flows instead of the messy truth. Using techniques like cluster analysis enables leaders to see *how* humans and AI actually interact with customers: the interruptions, mid-stream intent shifts, dead ends, and micro-moments where success or failure is determined. Designing for reality is the foundation of trustable hybrid systems.



2. BUILDING AI-READY KNOWLEDGE AND HUMAN-READY TOOLS

AI-driven service only works when organizations atomize knowledge into explicit, consistent, contradiction-free units. But associates must also be set up to succeed; AI-enabled content must outperform the legacy PDFs and tribal knowledge they've relied on for years.

3. REDEFINING SKILLS FOR A HYBRID ROLE

Traditional skills taxonomies are too broad to guide AI behavior and too static to support evolving human roles. Organizations must define *dynamic skill maps* that articulate what "good" looks like for both humans and AI. This also includes how those definitions change by product, region, regulation, or channel.

4. ESTABLISHING UNIFIED GOVERNANCE ACROSS HUMANS + AI

In most enterprises today, Training, QA, Operations, and IT operate independently with their own tools, taxonomies, and methods. In an AI-enabled world, this fragmentation becomes a liability. A single change to a policy or skill can require synchronized updates across scorecards, assist models, training simulations, and customer-facing agents. Without a unified "air-traffic control" layer, organizations will experience silent failures that damage both trust and customer outcomes.

5. PREPARING AND SUPPORTING THE WORKFORCE THROUGH TRANSITION

Agentic AI reshapes every job in the contact center. Associates must learn how AI works, when to trust it, how to supervise it, and how to recover from AI mistakes. They also need new career paths as routine tasks graduate to automation. Without thoughtful workforce transition, organizations risk skill atrophy, disengagement, and inconsistent customer experiences.

WHAT LEADERS MUST DO NOW

The new standard for AI adoption is straightforward but important: Human and AI performance must be visible, governable, and improvable in a single view.

The thousands of small moments where AI recommends, humans intervene, AI escalates, humans decide, or the system course-corrects *are* the customer experience. The first wave of agentic AI systems—understandably—focused on getting AI agents to perform their side of the equation. The next wave will need to fill the gaps on where/how humans and AI partnered, and what the resulting customer experience *really* was.



From Fragmentation to Focus: A Practical Playbook for Eliminating Agent Burnout

Contact center agents are caught between a rock and a hard place. In this era of innovation and transformation, agents face friction at every turn as contact centers migrate various systems, processes, and functions to AI tools. Externally, agents are met with confused and frustrated customers struggling to adapt to newly designed experiences that are more reliant on digital and AI-powered interactions.

All of this change leaves agents adrift, unable to provide meaningful resolutions for customers and incapable of working efficiently and effectively within their teams. It does not take long for this double-edged sword to erode the quality of agents' work experiences to the point of disengagement, burnout, and attrition.

While burnout is traditionally characterized as the result of a long, drawn-out process in which the spirit and motivation of employees are whittled down, under intense conditions it can happen more quickly. Today's agents are not just faced with difficult customer interactions, they are also operating within an ever-changing contact center, with a constant awareness of the fact that AI is in the process of fundamentally altering their role. The unique conditions of this transitional period are the perfect recipe for accelerated burnout.



As agents become more burnt out, they have a much harder time accessing those uniquely human skills that allow them to create experiences infused with empathy, understanding, and nuanced critical thinking. It is in these situations where the value of the human touch is made clear: while contact centers can staff for high turnover in the short term, the cost of eroded customer trust will be far higher than any meaningful investment in employee engagement.

“2026 will be about focus. Companies are getting intentional about where and why they deploy AI. They’re focusing on cost impact, measurable use cases, and proven results from real deployments. We’re moving from experimentation to execution.”
- Davit Baghdasaryan, CEO & Co-Founder of Krisp

Agent burnout is especially toxic to contact centers that are in the process of establishing new systems, training AI, or scaling operations. Consistency is especially critical in these periods, further emphasizing the need for engaged agents.

WHAT’S BRINGING AGENTS DOWN?

Widespread burnout is more than just disengagement, it is disengagement at a boiling point. Agents experiencing burnout often cannot cite just one reason for their malaise; it is a sense of overwhelm that pervades the contact center atmosphere and prevents meaningful work. While every workplace is different, the challenges agents encounter that most often lead to burnout fall into three distinct categories:

1. Fragmented systems

When their day-to-day is full of moments of frustration and disruptions to their momentum, even the most motivated agents’ performance will suffer. When agents are forced to jump between different applications, often duplicating their efforts and pulling their attention away from the customer’s issue to navigate between tools, it becomes much less likely they will be able to deliver a high-quality experience.

The disjointed nature of the agent tool box is often the result of leaders assessing and exploring tools in isolation and failing to consider how they will fit into the greater tech stack. Only 38% of leaders rely on a data-driven framework for identifying and prioritizing AI opportunities, while 37% rely on insights and recommendations from leaders, employees and other stakeholders, and 11% focus on industry trends and popular use cases in their market. At the same time, only 12% of leaders believe they even have a complete understanding of how AI will impact employee workflows and responsibilities. As much as we believe in the ability of these burgeoning technologies, it’s clear that our collective understanding of how they work is skewed if there is this little visibility into their operation.

Still, this fragmentation is affecting contact center operations of all sizes. We collect an extraordinary amount of data across channels and touchpoints, yet 69% of leaders believe that limited or nonexistent access to a 360-degree view of these journeys poses an operational challenge for employees. The insights we need to deliver all-around better experiences are within reach, we just need a more intelligent approach to presenting them to agents.

2. Outdated metrics

There is no way around it: contact center metrics need to change because contact centers have changed. Efficiency metrics made for an appropriate assessment when agents were balancing speed and accuracy, delivering a high volume of straightforward interactions that follow a script.

Today’s agents are expected to deliver a more consultative experience, and metrics that capture their speed and ticket volume only tell part of the story. As it stands, 69% of contact center leaders currently evaluate agent performance against customer satisfaction metrics and 64% evaluate against contact center efficiency metrics. When performance isn’t measured in a way that reflects true success, as in optimal customer outcomes, agents are forced to choose between offering a solution that may meaningfully appease customers, or chasing the productivity metric that will boost their performance. This has a chilling effect on agent motivation across the board.

3. Lackluster coaching and training

Coaching can be a powerful line of defense for agent disengagement, but is often under-prioritized. Providing thoughtful feedback not only points the agent in the right direction performance-wise, but it also offers a valuable touchpoint for supervisors to see each agent as an individual. If agents fail to complete coaching tasks in their systems, supervisors can check in with them. If agents fail to engage with feedback they’re given, that is a clear sign they may be about to churn.

Unfortunately, falling short in coaching and training initiatives is the norm. Only 29% of contact center leaders believe they have a comprehensive, real-time view of how all individual agents are performing, while 37% admit that their view of agent performance is fragmented across systems and channels. Without a unified view of their agents, it is especially challenging to provide meaningful feedback.

This has long needed to change, but coaching sits at a precarious intersection that requires both thoughtful leadership and intelligent automation to be most effective. 73% of leaders believe their current metrics are insufficient for measuring the quality of consultative agent work, pointing to a more systematic failure to prioritize agent effectiveness rather than a situation that could be resolved by increase in resource allocated to coaching.

TAKING A TACTICAL APPROACH TO AGENT BURNOUT

Instead of accepting high turnover as an inherent component of contact center management, leaders can address the source of burnout and empower agents to be engaged and motivated team members without stalling the necessary technology transformations or allowing customer experiences to suffer. More engaged and motivated agents can help the contact center to save money while delivering better customer experiences. Taking action to address all of the root causes of burnout can make a world of difference.

1. Deepen your understanding of the agent experience

Too often are decisions about what will best engage and motivate agents made without consideration for the agent's perspective. Many teams fail to capture meaningful feedback from agents until their exit interview, and at this stage the information is only so actionable. To understand why agents are turning over, there should be abundantly available touchpoints and channels for them to voice concerns, express dissatisfaction, and share their ideas for how processes could be improved.

Capturing agent feedback should be non-negotiable, but this is only one piece of the agent perspective. To effectively navigate biases, targeted analytics can offer a clearer picture than relying on traditional metrics alone. Speech analytics does this by surfacing insights from every conversation to understand friction, product gaps, and performance trends.

AI will take over the tasks that drain focus: note-taking, data entry, data search, repetitive troubleshooting; which means agents can finally do what customers actually value: problem solve. The next two years will be about augmentation, not automation. The best tools will fade into the background, giving agents clearer audio, cleaner context, and faster insight so they can stay present in the conversation. The shift won't make the job easier, but it will make it more meaningful.

- **Davit Baghdasaryan, CEO & Co-Founder of Krisp**

2. Leverage real-time assistance to create Super Agents

We recognize that human agents and AI have different but complementary strengths; the way they're expected to work together can make or break experiences for employees and customers alike. This balance must always lean in favor of the agent, establishing a protocol where AI exists primarily to serve agents, rather than be positioned as something agents feel they have to compete with. Real-time agent assist unlocks time and attention previously spent multitasking, allowing agents to focus on big picture resolutions instead of distracting rote tasks. This balance provides customers with the human touch they prefer, with an experience orchestrated, accelerated, and streamlined by AI.

Supporting agents in real-time is an essential characteristic of AI that serves agents, instead of the other way around. But agent assist supports on the process side, whereas voice intelligence focuses on enhancing what makes human agents human. Real-time voice AI removes noise, clarifies accents, translates languages and adapts to different speech patterns, delivering an enhanced experience without compromising on personalization or empathy.

Frontline employees are already using AI assist tools that support before, during, and after every interaction. Speech assist tools handle noise, accents, translation, and agent assist supports coaching and information retrieval in real time. These tools multiply human capability without removing the human connection.

- **Davit Baghdasaryan, CEO & Co-Founder of Krisp**



3. Ensure agents feel connected to their work

Efforts to combat burnout struggle to truly move the needle when they fail to address the way employees actually feel about their role and their work. This is a more abstract challenge than some others, but it can be remediated with a few intentional changes. Investing in more comprehensive coaching solutions, such as real-time AI coaching, allows agents to improve faster and more efficiently than they would if they went weeks without any feedback. Layers of touchpoints, feedback, and opportunities to voice concerns deepen the connection of agents to their work and provide supervisors with more avenues to predict and identify agents that are slipping into disengagement, while working to engage them further.

Across contact centers, the approach to metrics are being reconsidered. As the agent role becomes more consultative, contact centers are shifting their focus from metrics that measure contact center efficiency towards prioritizing those that measure customer satisfaction. Yet, the metrics being used to measure agent performance remain tethered to efficiency. Recognizing that efficiency can be significantly improved by even simple applications of AI, and that the consultative experience is something that is reliant on human skills, adjusting metrics accordingly will paint a much clearer picture of agent success, and give agents a clearer connection between their day-to-day work and customer outcomes.

Customer experience mirrors agent experience. You can't expect empathy or focus from people working through noise, lag, or cognitive overload. When agents have clarity and are empowered in their jobs, they engage more naturally. That shows up immediately in tone, confidence, and resolution quality. - **Davit Baghdasaryan, CEO & Co-Founder of Krisp**



TRANSFORM YOUR CONTACT CENTER TODAY

Defeating agent burnout may feel impossible when there is so much that needs to be changed about the employee experience, but the reality is that only a few aspects of agent work need to change to bring about significant improvement. Implementing tools that empower agents to deliver more efficient, effective resolutions has a two-fold benefit of creating excellent customer experiences while engaging agents more deeply. Agents who are engaged at this level are far less likely to churn, and over time, a culture of retention replaces that of burnout.

Example success stories follow.

Arrivia Boosts NPS by 99% with Krisp

CHALLENGE

Arrivia's international call centers are the backbone of its high-touch travel services, but accent clarity and background noise created friction in customer interactions. While agents were highly skilled, some customers struggled to understand them, impacting satisfaction and efficiency.

SOLUTION & RESULT

To solve this, *arrivia* deployed **Krisp's AI Accent Conversion**, enhancing speech clarity while preserving natural tone and flow. This followed the successful adoption of **Krisp's Noise Cancellation**, eliminating background distractions and improving agent focus.

THE RESULTS:

- + 99% in NPS
- + 26.1% in sales conversion
- + 14.8% revenue per booking
- + 13.5% in agent performance

With noise and accent clarity optimized, *arrivia* transformed its call experience—unlocking higher customer satisfaction, agent performance, and revenue growth.

"Krisp creates wins for our customers, company, and team members. It enables higher-quality interactions, unlocks new opportunities for our agents, and drives real productivity gains. Our partnership with Krisp has truly elevated our ability to deliver exceptional value."

- **Travis Markel, Chief Operating Officer at *arrivia***

Everise + Krisp: Powering the Future of Voice AI in CX

CHALLENGE

Everise sought to elevate customer experience (CX) at scale by empowering agents with technology that enhances clarity, naturalness, and accent precision in every interaction. The challenge was to find a solution that could consistently outperform existing tools in delivering clear, native-like speech while integrating seamlessly into enterprise environments.

SOLUTION & RESULT

Everise deployed Krisp's AI Accent Conversion and Noise Cancellation, enabling unmatched clarity, natural speech, and superior accent accuracy. Head-to-head comparisons across multiple clients showed Krisp scoring consistently in the Excellent/Native-Like range for clarity, phoneme precision, and naturalness—outperforming other providers.

THE RESULTS:

- **10K+ Everise seats deployed and scaling**
- **80B+ minutes of audio processed monthly on Krisp's platform**
- **200M+ devices run Krisp monthly to power real-world CX**

"By integrating Krisp's AI platform, including Accent Conversion and noise cancellation, we're amplifying the human touch at every interaction."

- Sudhir Agarwal, Founder & CEO, Everise



TTEC achieves 85+ NPS with Krisp Accent Conversion

CHALLENGE

TTEC handles millions of customer interactions every year—moments where clarity determines trust, empathy, and resolution speed.

As remote work expanded, several points of friction became clear:

- Accent-related comprehension issues disrupted conversational flow.
- Background noise compromised sound quality and credibility.
- Agents faced higher cognitive load, constantly monitoring how they sounded.

For a company known for its CX leadership, TTEC needed a scalable way to preserve clarity and empathy across

SOLUTION & RESULT

TTEC deployed Krisp's AI Noise Cancellation and Accent Conversion technologies across multiple voice delivery centers and work-from-home setups.

The rollout required no new hardware or process changes, allowing TTEC to move quickly from pilot to scaled deployment across key customer programs.

The impact of Krisp was measurable on operational performance and both the agent and customer experience.

THE RESULTS:

- **NPS improvement from 74 → 85**
- **70% savings by expanding voice delivery to India**
- **54% drop in "language barrier" mentions**
- **26% increase in sales conversions**
- **+8 points in CSAT**
- **5-point rise in overall experience score**
- **76% reduction in noise-related complaints**

"An 80+ NPS out of India is a spectacular number. It proves that with the right people, rigor, and technology, offshore delivery can excel."

- James Bednar, TTEC



How to Set Up Agents for Success: Leveraging Intelligent Automation

Customer standards are higher than ever. Meeting these heightened expectations requires a contact center that can provide an elevated level of support. Agents have long been expected to deliver a positive resolution for every single customer, but the parameters of these expectations have become stretched. Agents are now tasked with delivering resolutions using numerous unintuitive systems, struggling to communicate effectively with customers across channels.

Where many teams are struggling to determine where AI adds value to the employee and customer experience, pioneering brands have already moved into the next stage of AI optimization. The paring down of where exactly AI and automation can offer an advantage is a unique process for every organization, but some of the challenges forcing this transformation are relatively universal.

Currently, technology has created more problems than it has solved. Only 32% of leaders have a comprehensive, real-time view of how individual agents are performing. Interactions between the customer and human agents continue to bear the brunt of contact center exchanges, and while significant progress has been made in what AI can take on, this human-to-human dynamic is irreplaceable. As it stands, the distance between the two feels further than ever, with both parties dissatisfied by what technology has promised and failed to deliver.

All hope is not lost, however, with the right strategy in place and an intentional tech implementation, organizations can meet customer expectations and improve experiences.

“As these technologies evolve and become more common, and as customers grow more accustomed to faster support, the agent experience is going to become more challenging. This means agents need accurate knowledge at their fingertips.”

– **Dan Doman, Chief Operating and Product Officer, Upland Software**

WHAT’S HOLDING THE AGENT EXPERIENCE BACK?

Although many factors contribute to widespread agent despondence, it is not a mystery how we ended up here. For too long, agents have been expected to operate within limiting guidelines and scripts, their performance measured on output and efficiency, while being expected to deliver increasingly consultative and nuanced experiences. Ultimately, stripping agents of their agency has had a corrosive effect on both agent disposition and customer experiences. To reverse this, we have to identify where our contact centers are dropping the ball internally.

1. Agents are stuck in a state of limbo

Few roles have evolved in a more lopsided way than that of the contact center agent. In the past decade, every aspect of the role has become more complicated, dynamic, and bureaucratic, while the benefits and upward mobility have changed very little. A quarter of contact center leaders say AI has made a huge impact on the EX, and 13% of leaders feel they have a complete understanding of how agent roles and responsibilities are transforming amidst the AI revolution. This rift points towards a greater misalignment between leadership and the day-to-day reality of the agent experience.

Empowering their agents is a significant responsibility of contact center leaders, but too often is the term synonymous with empty gestures and initiatives that chase short term improvement in the agent experience but lose resonance over time. What agents really need are tools that make their jobs easier and leaders that recognize that engaged, motivated agents are crucial to better customer outcomes.

When investment decisions about contact center technology fail to capture the nuances of how it will impact agents on a granular level, it further reinforces the premise that agents are more or less cogs in the machine of the contact center. This idea is fundamentally at odds with the value agents supposedly provide in offering customer contact with a human touch. Human-centric customer service is reliant on agents who have the bandwidth and the capacity to be empathetic, considerate, and perceptive, and uninspired employees have a much harder time delivering this caliber of service.

2. Inefficiencies add up to wasted time

Another dimension of the suboptimal agent experience is the exorbitant amount of time spent on menial tasks in the contact center. Agents spend a great deal of time navigating their own tools and interfaces, both during calls with customers and for pre- and post-call responsibilities. This adds up in a major way.

From a bottom line perspective, this should be an urgent priority. Systems and tools that are supposed to be adding value are actively detracting from it, and agents are often the ones fielding the customer complaints in response. Every moment spent on internal systems is a missed opportunity for agents to give their full attention to customers, and any level of agent distraction is felt by customers on the other side of the call.

One of the top obstacles preventing agents from excelling at more complex and consultative work is the amount of friction in current systems, tools, and processes, with 73% of leaders experiencing this challenge. This friction manifests as time spent searching, scrolling, copy and pasting, and other tedious actions that agents take when their systems don’t work for them.

“There is nothing worse than feeling ignored by an agent who’s more focused on navigating procedures and watching the clock than on actually helping. Enabling agents with tools that make the transactional part of the call easier, allows them to use their soft skills to make more of a human connection with customers.”

– **Dan Doman, Chief Operating and Product Officer, Upland Software**

As the different sources of friction compete for agents’ attention, their work suffers. The measurements we use to identify these sources of friction have their own set of problems, which will be discussed in the next section, but the big picture is one of disconnectedness and discordance.

3. Old metrics no longer resonate with new definitions of success

Contact center metrics have not advanced to keep pace with the evolution of agent work. As the primary function of agents has shifted from providing customers resolutions at scale to providing customers with high-quality interactions that only a human agent can offer, an overhaul of how success is measured is now warranted.

Businesses may be slow to overhaul entire performance management programs because of the up-front cost. Still, failing to adjust agent performance metrics in accordance with new agent standards creates more malignant problems that may result in higher expenses long-term. Even most contact center leaders recognize this: 70% of leaders believe that the current metrics and quality assessments are insufficient for measuring consultative work.

Of course, the contact center metric matrix must be multi-dimensional, and currently 71% of leaders already measure performance against customer satisfaction metrics, while 65% use contact center efficiency metrics. It is not that these figures offer no value to leadership, rather, it is the overlooking of other, more insightful measures that are under-prioritized. For example, only 37% are analyzing agent activity in knowledge searches and CRM lookups to get a more holistic view of agent performance, and only 20% have dedicated agent effort metrics at all.

IMPLEMENTING A MULTI-DIMENSIONAL SOLUTION

Devising a solution that tackles all of these challenges will require a mix of internal organizational changes and investment into tools that work for agents (and not the other way around). When it comes to AI, identifying specific areas where it can add value, and not just become an expensive yet under-used tool, is the most critical step. Looking ahead to the next two years, 80% of leaders will hold AI accountable for improved agent productivity, while 71% will hold AI accountable for improved agent satisfaction and retention.

1. Modernize your knowledgebase with AI

More than any other part of the contact center, the knowledgebase is rife with opportunities for optimization with AI. AI is best suited for systems that are logically organized, have clear rules of order, and house all of the relevant data in one system. Products like RightAnswers help agents save considerable time by eliminating the challenge of manually seeking out information from disparate repositories. AI-backed knowledge lookup also eliminates a great deal of human error in the search and retrieval process, ensuring agents get information to customers faster and more accurately.

Searching and surfacing pieces of information is one of the most tried and true use cases for AI, making it a reliable area to invest in without signing on to reorchestrate entire processes and systems. Intelligent search and knowledge lookup is the number one priority for AI investment for contact center leaders in 2026, with 94% of CCW Digital respondents citing it as a priority because it has a better cost/benefit ratio than most other investment areas.

“AI management of knowledge will ensure that the information agents are accessing is correct, up to date and there is one source of truth for it. AI search will then surface this one result, getting the correct piece of information in the agents’ hands faster.”

– Keith Berg, Senior Vice President of Product, Upland Software

2. Guarantee seamless workflows with CTI

Cohesive integration of systems is the only way to eliminate wasted time at its source. Long hold times and a poor first-call resolution rate are just two of the signs that a contact center could benefit from computer telephony integration (CTI). Without CTI, there is only so much agents can do to leverage their existing technology, as they will constantly be hampered by the delay associated with asynchronous systems.

Many contact center leaders fail to recognize the urgency at which they need to adopt products like InGenius for CTI because they have such limited visibility into their team’s operations. While diving into new projects may sound like more work for contact center teams, it’s more likely a matter of reallocation. Only 19% of contact center leaders actively monitor the extent to which employees are engaging with AI tools, missing invaluable opportunities to scale back on underused and underoptimized tools that use up significant budget.

CTI complements agents’ established workflows and allows them to more easily provide the human element to customer experiences. When agents have to dedicate less time to the bureaucratic side of their role, they can accomplish much more of the work customers actually appreciate.

“We never advocate for AI or technology replacing humans, while it is a super powerful tool, and getting better by the day, the agent is still the frontline gatekeeper, it is crucial to keep humans in the loop to ensure accuracy and add a personal touch that AI can’t match.”

– Keith Berg, Senior Vice President of Product, Upland Software

3. Automate KM compliance

Compliance traditionally sits across functions, with agents and teams at each step of the customer journey carrying some degree of responsibility. In highly regulated industries this is an especially resource-consuming function, and compliance adherence is only as strong as its weakest link. The maintenance of knowledgebases faces a similar conundrum, with valuable information rendered useless when teams fail to keep it up-to-date. Across the board, 62% of leaders see knowledgebases as a consistent challenge for employees because they're outdated, inconsistent, or otherwise hard to navigate.

"Heavily regulated industries like healthcare and finance tend to lag behind more cutting-edge companies in the technology or retail spaces, the problem is that customer expectations keep up with those cutting-edge companies. When they experience longer wait times, they don't care that it is because your company is being cautious with adoption of technology." – **Dan Doman, Chief Operating and Product Officer, Upland Software**

In 2025, compliance and industry-specific regulations are no excuse to deliver suboptimal experiences. Products like Panviva removes the burden of compliance across individual agents and supervisors, dramatically reducing the chance for slip ups that snowball into serious ramifications.



SEIZING OPPORTUNITIES FOR INTELLIGENT AUTOMATION

With the amount of contact center technology available, for most leaders the conversation has shifted to be about where to invest, not if investment is needed. With the Upland Software portfolio, organizations like Nevada Health Centers and Paychex are able to take precise action in improving the employee experience.

Nevada Health Centers (NVHC)

CHALLENGE

NVHC offers a wide range of service lines, including primary care, behavioral health, dental services, mammography, nutrition support, pharmacy and more, provided both in-person and virtually. Although there is some training for staff, there is no way to ensure consistency in scheduling, registration, or revenue cycle protocols through training alone, due to the amount and complexity of information. NVHC also needed an easy way to keep up with ongoing changes throughout the organization.

SOLUTION & RESULT

With Panviva, call center, scheduling teams, front desk, and customer service teams have access to the information they need to do their jobs quickly, consistently, and efficiently, in compliance with government and company guidelines. Using Panviva, the front desk expects to improve the registration process to positively impact the revenue cycle.

NVHC hopes to experience fewer rejected claims, returned mail, assigned tasks to fix demographic and eligibility errors, and unnecessary write-offs of patient encounters. NVHC also expects to improve employee satisfaction by increasing access to information through Panviva.

BY PARTNERING WITH PANVIVA, NVHC GOT THESE RESULTS:

- **75% reduction in training time (from 4 weeks down to 1 week)**
- **59.4% reduction in agent turnover**
- **15% reduction in call abandonment**

Paychex

CHALLENGE

Paychex, a leading provider of HR and payroll services for over 590,000 clients, faced significant operational hurdles as it scaled. Critical knowledge was fragmented across shared drives, ITSM tools, and local databases, leading to inconsistent service desk responses and rising contact volumes. With new products on the horizon, Paychex needed a unified strategy to manage increasing support demands while maintaining its high standard of customer experience.

SOLUTION & RESULT

Paychex implemented RightAnswers as its centralized knowledge management platform, adopting the Knowledge-Centered Service (KCS) methodology to embed knowledge sharing into daily workflows. The initiative began with the service desk and expanded enterprise-wide through a self-service portal, Ask IT. The company established a standardized taxonomy and strong governance, refining its knowledge base from over 64,000 articles to 50,000 validated resources.

To accelerate its AI evolution, Paychex leveraged RightAnswers' AI tools, including Gen Answers and Knowledge Assist, in targeted proof-of-concept initiatives. The company discovered that involving frontline users was key to improving accuracy. Paychex now uses AI-powered authoring and Knowledge Gap Analysis to identify missing information, standardize article formats, and empower subject matter experts to efficiently create and refine content.

Through its partnership with RightAnswers, Paychex successfully built an AI strategy on a strong knowledge foundation, shifting its focus to adoption, engagement, and measurable business impact.

KEY OUTCOMES INCLUDE:

- **Faster, more accurate resolutions across all service channels.**
- **Reduced contact volumes through enhanced self-service capabilities.**
- **Greater SME participation in content creation, improving inclusivity for global teams.**
- **A culture of innovation that values knowledge, trust, and AI with purpose.**





How Technology and Humanity Act as Partners in Progress

As we enter 2026, the relationship between human agents and AI is becoming one of the most critical levers of performance in the contact center. Instead of viewing technology and people as competing forces, leading organizations are redefining them as partners, each strengthening the other to deliver better experiences, smarter operations, and more resilient teams.

This transition is not without complexity. Leaders must modernize workflows, upgrade skill sets, and guide their teams through uncertainty while customer expectations continue to accelerate. Yet the effort is paying off. According to CCW Digital research, 87% of organizations report that AI investment has already improved the employee experience, signaling that AI's impact on the workforce is not theoretical. It's real, and it's gaining momentum.

Still, the path forward demands thoughtful leadership. Agents want clarity, confidence, and a clear understanding of how AI augments their roles, despite the narrative that their roles are at risk because of AI. The opportunity for 2026 is to replace fear with transparency and design an employee experience where technology empowers talent rather than competes with it.

Catherine Forino-Small, Director of Product Marketing at NiCE, reinforces this shift, noting that "technology and humanity are partners in progress." A human-centered strategy, one that elevates both intelligence and personal connection, is what will allow organizations to thrive in an AI-powered future.

In partnership with NiCE, CCW Digital explores three essential strategies for building a CX operating model where people and technology work in concert, leading to higher performance, stronger engagement, and more connected customer experiences.

1. Ensure AI and Humans Operate as One System

Debates about “technology versus humanity” miss the point. In modern CX, AI and human expertise are not competing forces; they are interdependent components of a single operating system. The organizations winning in 2026 are those that design their workflows so people and AI act together, each amplifying the strengths of the other.

“At NiCE, we see technology and humanity as partners in progress. Being AI-first means embedding intelligence into every workflow, so automation, augmentation, and orchestration work together to create more human experiences. Through CXone Mpower and NiCE Cognigy AI, AI and humans operate as one system, anticipating needs, assisting in real time, and orchestrating experiences that feel effortless for customers and empowering for agents,” Forino-Small shares.

When AI and humans collaborate, organizations can create a balanced experience. Customer needs are more dynamic than any single agent can manage alone, and leaders cannot scale service with people or tools in isolation. By partnering AI and humans, customers will get the best of both worlds: a fast, highly personalized experience.

It is important to note that this can only be achieved when AI is embedded intentionally. By integrating AI into the agent and customer workflow, agents can collaborate effectively with the technology. If the technology is not accessible or seamless to use, organizations will struggle to see the desired result.

The NiCE team shares that AI must be connected in every workflow, decision, and interaction through a unified platform. With this in place, organizations can turn service into something faster, smarter, and more human at every touchpoint.

2. Work to Understand Impact and Performance

As organizations deepen the partnership between people and technology, one truth becomes clear: you cannot improve what you cannot see. AI should actively enhance both agent performance and customer outcomes, and leaders must be able to measure whether that is truly happening across every workflow and interaction.

This requires a new level of observability. Traditional metrics only capture fragments of performance. In the AI era, leaders need visibility into how intelligence influences outcomes holistically, from efficiency and accuracy to sentiment, loyalty, and the quality of human-AI collaboration.

“Performance in the AI era isn’t just about handling time or efficiency. It’s about impact. With built-in AI observability, leaders can track how AI influences efficiency, sentiment, and customer loyalty in real time. We help organizations measure outcomes such as sentiment, resolution, success, and the collaboration between human and AI agents,” shares Madeline Hooper, Senior Product Marketing Manager, CX Division at NiCE.

To ensure technology is actually improving workflows and outcomes, leaders must ensure their tech stack enables heightened observability. The need for this level of insight is urgent. CCW Digital research reveals that while 77% of leaders plan to hold AI accountable for improving employee productivity, only 28% have a holistic measurement framework. Without consistent, standardized visibility into AI’s impact, organizations risk making assumptions rather than making decisions and missing opportunities to refine workflows, strengthen the employee experience, and improve customer outcomes.

Effective observability bridges that gap. It connects operational data to experience outcomes, making it possible to see if automation is reducing friction, whether agents feel supported, and to ensure AI is enhancing, not undermining, the human experience.

In a world where AI investment is rising and expectations are even higher, leaders must move past buzzwords and measure what truly matters. When organizations can clearly see the impact of AI, they can ensure that technology delivers real value: empowering agents, improving productivity, and transforming operations with confidence.

Treat AI as a Teammate

One of the biggest barriers to AI adoption is perception. When new technology is introduced without a clear strategy or narrative, employees often mistakenly interpret it as a threat to their roles, skills, or value within the organization. That fear slows progress, even when the technology is designed to support them.

The reality is that AI is reshaping work by augmenting the people who complete it. Certain tasks will continue to be automated, and workflows will evolve. But the human role becomes *more* important, not less. To unlock this value, leaders must position AI as a teammate that amplifies human strengths.

CCW Digital research reinforces this shift: more than half of leaders say their AI investments have *increased* humanity in the customer experience. When AI is leveraged as a support system rather than a substitute, it frees agents to spend more time on what truly matters – personal connection, judgment, and complex problem-solving.

“Within your organization, treat AI as a teammate that learns and grows with your team. Give agents visibility into how AI supports their work and invest in adaptive learning that builds confidence and curiosity. Transformation accelerates when employees trust the technology that empowers them.” – **Madeline Hooper, Senior Product Marketing Manager, CX Division at NiCE.**

Trust is the hinge point. Agents must understand *why* AI is being deployed, what problems it solves, and how it helps them succeed. When employees see AI delivering real value, for example, removing tedious tasks, reducing cognitive load, improving accuracy, and preparing next steps, this shifts their perspective from skepticism to advocacy.

Catherine Forino-Small adds perspective on how AI can function as a truly collaborative teammate: “CXone Mpower Copilot proactively guides agents in real time. With conversational and agentic AI working hand-in-hand, organizations can build virtual teammates that collaborate seamlessly with their human counterparts.”

When employees gain this level of support and clarity, their workflow transforms. They gain a virtual partner that augments their capabilities, orchestrates tasks, and ensures every interaction becomes more seamless, intuitive, and personalized. And organizations gain what every leader wants: a confident workforce, empowered by technology, delivering consistently outstanding experiences.

BUILDING A CULTURE OF CONNECTION

As the contact center evolves, one element remains constant: customers expect service that is fast, accurate, and deeply connected. The next generation of support will not mirror today’s workflows, but its foundation will still depend on the perfect balance of intelligence and humanity. AI and human talent bring complementary strengths, and when combined intentionally, they form a service model capable of meeting customer expectations at scale.

“When AI and humans thrive together, service becomes faster, smarter, and more human. That’s how organizations can create a NiCE world, one where service works better for everyone.”
– **Catherine Forino-Small.**

In this period of rapid transformation, maintaining focus on people is essential. Organizations that invest in performance visibility, embed AI thoughtfully throughout the workflow, and continually reassess the needs of both agents and customers will navigate change with clarity rather than disruption.

A purposeful approach ensures that AI is deployed where it drives value, accelerating processes, anticipating needs, and removing friction while humans remain central to connection, personalization, and nuanced decision-making. This balance empowers agents to remain fully engaged in customer conversations while AI manages the complexity behind the scenes.

This is the culture that will define industry leaders in 2026: one where AI and humans operate in harmony, delivering service that feels seamless, personal, and consistently exceptional. Organizations that embrace this connected model will stay ahead, not only meeting rising expectations but also elevating the entire customer experience.



Itau Unibanco

CHALLENGE

Build an AI-based service model while improving customer and agent experiences.

SOLUTION & RESULT

Implemented NiCE CXone Mpower AI platform, leveraging AI-enhanced tools that have reduced interaction volume, improved handle time, and enabled Itau to work toward a right-sized team. About the partnership with NiCE, Itau Unibanco's Contact Center Engineering Manager, Thiago Shiguelo Miyahira, said, "NiCE found a way to consider our future needs, ones we didn't even know yet. NiCE is helping us reach the level of other major players in the industry."

- **4,500 agents using CXone Mpower platform**
- **15% improvement in average handle time**
- **13% decrease in interactions**

Hyatt

CHALLENGE

Deliver consistent support across properties and regions.

SOLUTION & RESULT

Starting with CXone Mpower Expert, then expanding to CXone Mpower Copilot for Agents, Hyatt is building a scalable, AI-infused ecosystem that empowers agents, accelerates resolutions, and puts consistent, reliable answers at the center of every guest interaction. At Hyatt, human agents were inspired by real impacts they saw when updating knowledge articles that fed into one of NiCE's AI-powered Copilots, speaking to the positive outcomes possible when AI tools are positioned as teammates. Describing human agents' attitudes toward updating knowledge articles, Elisha Wright, Global Director of Learning Design and Delivery at Hyatt said, "At first, people were hesitant to change the articles, but when they saw how Copilot improved with better content, they were all in."

- **100s of legacy articles restructured and migrated**
- **250+ agents using Copilot across the Americas**
- **Steady improvement in first-contact resolution**

Bamboo Insurance

CHALLENGE

Improve customer and agent experience with AI

SOLUTION & RESULT

Through a strategic, phased rollout of AI-enabled CXone Mpower tools, the company is transforming its agent and customer experience, cutting training time, improving Quality Assurance and customer satisfaction scores, and building a future-ready operation that reflects its bold brand. Brock Christensen, VP of Operations at Bamboo Insurance, describes the impacts he is seeing from NiCE's AI solutions: "AI is not a replacement for human interaction – it's the tool that helps us be more efficient and find answers faster. The AI-enabled solutions from NiCE help us build confidence and accuracy in the background, giving agents, supervisors and customers a more streamlined and impactful experience.

- **1 week cut from new agent training time**
- **Same-day customer response on complaint calls (down from 2 weeks)**
- **15-point increase in CSAT**
- **Double digit improvement in Net Promoter Score scores (from the mid-50s to 70)**





Designing the Future of Support with AI + Humans at the Center

When thinking about the future of the contact center, the conversation is often framed on balance. Balancing technology with human needs, balancing speed with an empathetic touch or balancing employee needs with customer outcomes. At the root of this focus on balance is a fear of losing the human in all of this.

Customers and contact center leaders alike are concerned that the more we automate and innovate, the less we will recognize the human touch that we know and love. What's interesting however, is that many organizations are not really in the position to deliver this level of support without the help of technology.

According to CCW Digital research, 74% of CX leaders state that there is still too much friction in the current systems, tools and processes agents use which is preventing them from excelling at complex and consultative work.

What we might be getting wrong, then, is this need for a perfect balance between technology and people. At the end of the day, employees cannot thrive if they do not have the resources and tools to succeed. Delivering a heightened level of support might depend on greater automation on the frontline. There are moments that might require more or less technology and automation, and determining that can help set agents up for success.

Ali Merchant, CEO, CallBotics shares, "What we've learned in the past 17 years working with mid and large enterprise contact centers is that balance isn't a static goal; it's an operating rhythm. The right mix of AI and people continuously evolves with data and feedback loops."

As Merchant states, it's not always an equal balance. Striving for exceptional customer outcomes means that organizations are constantly evolving, shifting processes and securing resolutions for customers. This will evolve and change, but the goal of exceeding customer expectations and delivering meaningful support will not.

DESIGNING FOR THE FUTURE OF CX

If we are not necessarily aiming for an equal balance of humans and AI — what are we striving for? When we push beyond fears of automation removing the human touch, we can see a holistic picture of where AI fits in, and where it does not.

To deliver better experiences, contact center leaders should shift away from prioritizing efficiency and focus on establishing an experience that actually meets customer needs. In doing this, organizations can begin to design experiences for a modern customer.

“The dynamic between AI and humans is shifting from substitution to orchestration. A growing share of customer interactions will be managed autonomously by AI, while humans will focus on supervising performance, refining edge cases, training models, and ensuring quality and compliance. In the next phase of CX, humans won’t just handle conversations — they’ll architect them. That’s the evolution already underway inside next-generation contact centers,” shares Merchant.

By automating routine tasks and prioritizing context, leaders can prepare their frontline to deliver comprehensive interactions. This is something that needs to be addressed now, as 61% of leaders stated that they have not yet mapped out the new tasks and functions of the next-generation agent experience, according to CCW Digital research.

With so few organizations actively prepared for this shift, it is critical to take this moment to deeply understand how technology will impact the agent role and support this transition.

Where AI Fits In

As organizations are designing next-generation experiences, it is essential to determine where AI fits in, and where it does not.

Merchant shares insight on where it will add the most value, “AI should take on anything that’s repeatable, time-sensitive, or rule-driven — tasks that require consistency more than creativity. This includes verifying information, collecting details, scheduling, routing, providing updates, and more. The key isn’t just what AI automates, but how it does it — through real-time context, natural language understanding, and seamless integration into enterprise systems.”

Consistency over creativity is key; when technology can take on the most repetitive tasks, it ensures that agents are focused on the valuable conversations. Areas like note taking, post call work and scheduling can seamlessly be addressed through automation.

Additionally, it can act as an effective frontline channel avoiding unnecessary escalations to the agent. According to CallBotics, AI voice agents are capable of handling the majority of customer interactions, with automation levels around 80% in optimized workflows.

With that level of service, organizations can shift the more complex interactions to the agent, ridding them of simple, repetitive calls. This also helps cut average handle times and empowers agents to spend more time connecting with customers during key moments.

AI + Human Support

While removing repetitive, low-level tasks is important, it is not the only area that organizations can improve. This transition opens up a world of opportunity for agents to deliver more personalized and meaningful support.

“When implemented correctly, AI doesn’t just reduce workloads — it elevates the quality of human work. Calls that do reach agents arrive with full transcripts, context, and next-step recommendations. That means agents aren’t starting from zero; they’re starting where the customer left off. The result is higher accuracy, faster resolutions, and more engaged teams,” states Ali Merchant.

According to CCW Digital research, 40% of customers state that they often have to repeat information and answer repetitive questions during a typical service interaction. By giving agents access to this context, they are able to not just provide an accurate answer but build a rapport with customers that feels genuine. When agents are able to quickly address customer concerns, it gives the impression that they are eager and excited to deliver a high-quality experience.

With AI, many customers have shown concerns about the lack of humanity and a shift toward more robotic and overall less personalized support. But, in so many ways, AI can empower deeper conversations, more meaningful connections and better outcomes. By implementing it in the right workflows, organizations can achieve a future where AI and humans work collaboratively.

Getting Customers on Board

The human element of CX goes beyond agents, it's also about the customer. While technology can be incredibly powerful, it only works if customers *use* it. CCW Digital confirms that 81% of leaders state that some customers simply refuse to engage in self-service altogether.

If customers don't understand the benefits or see the use in a tool, it will not be successful. Therefore, leveraging tools that add value to the experience and actually show meaningful improvement in the customer journey is critical.

"Customer adoption doesn't come from technology — it comes from trust. The first impression customers form of an AI agent isn't based on how intelligent it sounds, but on whether it listens, responds naturally, and resolves their issue without friction. That's why we tell every client that implementation is only half the job; tuning the experience is the other half. The best deployments treat AI agents like new hires — train them, test them, and refine their tone, responses, and actions based on real customer interactions. In our deployments, we even add subtle pauses, fillers, and the small imperfections that make a voice sound human and relatable," shares Merchant.

Throwing another tool at customers just to prove that your brand is keeping up can end up having the opposite effect. Brands that work to innovate with intention and roll out tools in a strategic way, will see far greater results.

Starting the Journey

While starting any journey can be daunting, it is far more realistic and accessible than organizations might think. Merchant gives some hope to leaders who may feel overwhelmed, "Let's be practical — implementing AI doesn't have to be difficult, expensive, or disruptive. When you have the right approach and the right partner, AI can integrate into existing workflows faster than most expect."

The key, though, is taking things at the right pace. When organizations attempt to move too quickly or focus on the wrong areas, it can end up backfiring.

"AI initiatives rarely fail because of technology — they fail because teams start in the wrong place. You don't need a perfect data strategy or a multi-year AI roadmap to begin; you need one clearly defined workflow where success is measurable. Start there, prove value, and expand from that foundation."

As we look ahead, it is essential to implement technology that adds value to both the customer and agent experience. When organizations slowly iterate and continuously improve, they will be able to innovate at a pace that feels natural and productive. When considering the technology versus humanity theme, it is this strategy that will help organizations achieve both objectives. Implementing with intention, focusing on specific use cases and proving value are all necessary steps to succeed.

By moving beyond the debate of tech versus humanity, and embracing a technology plus humanity mindset, leaders can obtain a more objective look at how AI and technology can help and where it might hurt. In prioritizing productivity, a human touch and a seamless end-to-end experience, organizations can set forth a path for human-centered support.

Case Study

COMPANY

A leading benefits administration and open enrollment support contact center provider

CHALLENGE

Seasonal call volumes surged from 5,000 to 18,000 per day during the Annual Enrollment Period (AEP), leading to SLA breaches, member dissatisfaction, and rising costs. Manual hiring cycles caused 17-day staffing delays, cost-per-call escalation, and high abandonment.

SOLUTION & RESULT

- CallBotics deployed AI voice agents within 48 hours, securely ingesting 183 plan documents and integrating with the firm's eligibility, claims, and CRM systems. The AI handled 84% of calls autonomously, cut average handle time by 23%, reduced human escalation to 16%, and achieved near-zero wait times and 100% bilingual coverage. CSAT improved from 3.6 to 4.2/5 within 30 days, and audit risk was eliminated.



Customer Intelligence: The Bridge Between Empathy and Efficiency

In citing loyalty as their Holy Grail objective for 2026, customer contact leaders are underscoring the imminent importance of connections. They are not merely looking to answer questions or process transactions: they want to cultivate the relationships that lead to measurable growth in lifetime value, market share, and revenue.

If connections are the priority, then *humanity* is the imperative. Brands cannot deliver the same, generic, context-agnostic experience to all customers and expect them to feel seen, heard, or valued. They cannot be surprised by CCW Digital research confirming that less than 20% of consumers feel today's interactions are sufficiently personalized.

This pursuit of human-centric connections comes amid two key marketplace trends: the surge of AI-powered communication, and a widespread emphasis on cost containment. AI initiatives related to self-service and process automation rank as universal investment priorities for 2026, while 90% of contact centers admit they are facing cost pressure.

How can you ensure these trends do not become roadblocks to success? How can you ensure they do not result in a more transactional approach to the customer experience?

The answer is an innovative approach to customer intelligence. By unlocking and activating critical insights from all phases of the customer journey, leading organizations are opening the door to empathetic experience design. Customer journeys become empowering rather than impositional. Conversations are engaging rather than transactional.

“In a market where loyalty drives growth, brands can’t afford transactional experiences. The winning model is clear: Human-Led; AI-Empowered. Customer intelligence is the bridge—unlocking context, sentiment, and real-time insight so journeys feel both deeply human and operationally precise.”

– Paulo Silva, Head of Strategy and Sales,
Sutherland Global

Not simply a theoretical asset, robust customer intelligence is driving quantifiable results in the real world. Leaders like Sutherland Labs are already proving that data can be the bridge between empathy and efficiency.

This briefing details their keys to success.

ROADBLOCKS TO EMPATHY: WHY TODAY’S INTERACTIONS ARE TRANSACTIONAL

Presently, businesses are not simply asking customers to make trade-offs. They are asking them to endure the worst of all worlds.

They are not choosing *between* speed and personalization; they are getting neither. Only 26% of consumers feel their experiences are convenient, while just 18% believe they are personalized.

They are not choosing between simple AI-powered conversations and consultative agent-led ones; they are getting neither. Only 15% of consumers trust chatbots to solve their problems, but just 20% feel the typical employee is empathetic. A mere 22% feel human agents are knowledgeable about customers and their issues.

What is creating this lose-lose scenario? The answer is an inadequate data framework, and it is a challenge that is only growing amid the rise of so many new contact channels and technologies.

A staggering 80% of customer contact leaders say existing databases and systems thwart the success of their AI investments; 72% concede that they are not empowering agents with the data and knowledge they need to engage in more personalized, consultative conversations.

Thanks to this inhibitive framework, customer-facing AI will fail to deliver the level of convenience, linguistic understanding, or personalized engagement needed to resolve issues. Customers will escalate to live agents, clogging queues and preventing employees from devoting adequate attention to customer issues.

To make matters worse, those agents will not have seamless access to the issue summaries, customer profiles, real-time intelligence, and product knowledge needed to deliver swift, personalized resolutions. They will have to fumble through convoluted knowledge bases to access the right context, leading to *further* inefficiency and frustration. Both, ultimately, trickle down to the customer.

THE DATA OPPORTUNITY: TURNING INSIGHT INTO DESIGN INTELLIGENCE

Whereas the digital transformation has added new touch points and complexity, it has also created an unprecedented opportunity.

By providing a considerably more complete picture of the different ways customers engage with a business, it opens the door to a newfound understanding of the market. Businesses can learn considerably more about how customers prefer to engage, how they choose to frame their issues, what resolutions they are pursuing, and how different messages and behaviors make them feel.

Capable of unifying and processing these insights at scale, AI technology *further* elevates and democratizes customer understanding. Customers can learn every nuance of how customers react to certain engagement options and conversational stimuli, fueling enhanced journey design and organization.

Leveraging this data, businesses will understand how best to route customers throughout the journey, getting them to the channels they need when and where they need them. They will learn when self-service makes sense and when agent ingenuity is the key to success.

Further, they will uncover opportunities for *predictive and proactive care*. What are the root causes that tend to drive the most inbound volume? Which parts of the “escalation” process tend to create the most unnecessary friction? What opportunities exist for driving *more* marketing and sales conversions?

Such insight can also elevate employee performance, identifying broken processes, skills and training gaps, and operational friction that are thwarting agents’ ability to form meaningful connections with customers.

By correlating experiences and initiatives with outcomes that actually matter to the business – revenue, market share, and profit, as opposed to call count or average handle time – this intelligence is quite simply the gateway to a more customer-centric contact center operation.

ACTIVATING ANALYTICS: BUILDING RELATIONSHIPS IN THE AGE OF AI

As a gateway to better resourcing, seamless journey design, and proactive engagement, advanced analytics will increase efficiency and engagement quality. They will make it easier for customers to get what they want when they want it, cultivating the reliability and trust that are hallmarks of great relationships.

The opportunity does not, however, stop there. It extends to creating more consultative, empathetic, emotionally aware conversations. The kinds that turn *business conversations* into human relationships.

The right approach to customer intelligence does not simply zero-in on *behavioral* data; it also uncovers *sentiment intelligence*. It analyzes shifts in customer tone, conversational style, and emotion to determine what the customer is feeling at a given moment.

From there, the business can tailor individual interactions – and not just overarching journeys. In a self-service context, it can trigger instant escalations to live agents when the customer is expressing anger or frustration. In an employee-led context, it can arm agents with real-time insight on how to phrase certain issues, when to prioritize emotional support over efficient problem-solving, and when to pursue or abstain from upsell efforts.

By rooting conversational flow in *data* rather than just “raw feeling,” organizations do not simply enhance levels of empathy and personalization. They also make these qualities measurable, determining how certain approaches help or hurt customer loyalty and advocacy.

HUMAN IN THE LOOP: EMPATHY WITHOUT INEFFICIENCY

If the goal is to *bridge* empathy and efficiency, they should not feel like disconnected concepts. Brands should not be designing journeys based on binary principles like “AI for simple issues, agents for complex ones.”

Instead, they should be combining humanity and technology to deliver the optimal elements of *both* in real-time.

This is where the human-in-the-loop approach makes considerable sense. In this scenario, customer-facing AI would actually handle the majority of frontline communication. Agents, however, would be available to provide guidance or even fully take over – whether based on a need for an “off-script” resolution, a deeper clarification, or emotional deescalation.

A steady flow of data is critical to this model. Real-time insights will make clear *how and when* the human agent can support the AI, while seamless access to the data will provide the context needed to do so effectively.

“At Sutherland, we’ve seen that AI is most transformative when it elevates people. AI delivers predictive and emotional intelligence; humans turn that insight into trust, empathy, and connection. When frontline teams are empowered this way, conversations become personal, confident, and outcome-driven. Brands adopting a Human-Led; AI-Empowered strategy will lead the market—those that hesitate will be racing to catch up.”

– Paulo Silva, Head of Strategy and Sales,
Sutherland Global



Appendix



- How OP360 Drove Double-Digit Productivity Gains with 8Flow in 6 Weeks
- How a Fortune 500 Travel & Hospitality Platform Boosted Back-Office Productivity by 26% with 8Flow



- Learn more about ASAPP's Customer Experience Platform (CXP)
- Book a demo of CXP



- The Ultimate Guide to Agentic AI in the Contact Center
- Why Doubling Down on CCaaS Isn't Enough



- About Krisp
- How TTEC Achieves 85+ NPS with Krisp



- It's not outsourcing, it's outsmarting, it's Liveops
- Whitepaper: Finding the Right Contact Center Model: In-house, Traditional BPO, or Flexible Outsourcing



- How Flexiti decreases AHT by 40s
- How Nymbus achieved 98% CSAT



- Paychex Drives Scalable AI Knowledge Evolution with RightAnswers
- The Knowledge Activation Gap: Uncovering What's Holding Enterprises Back in the Age of GenAI



- AI Call Centers: What They Are & How They're Transforming Customer Service
- The AI Voice Agent That Understands Your Floors — Built from the Inside, Not the Sidelines



- NovaTech Case Study
- The Escape Room Case Study

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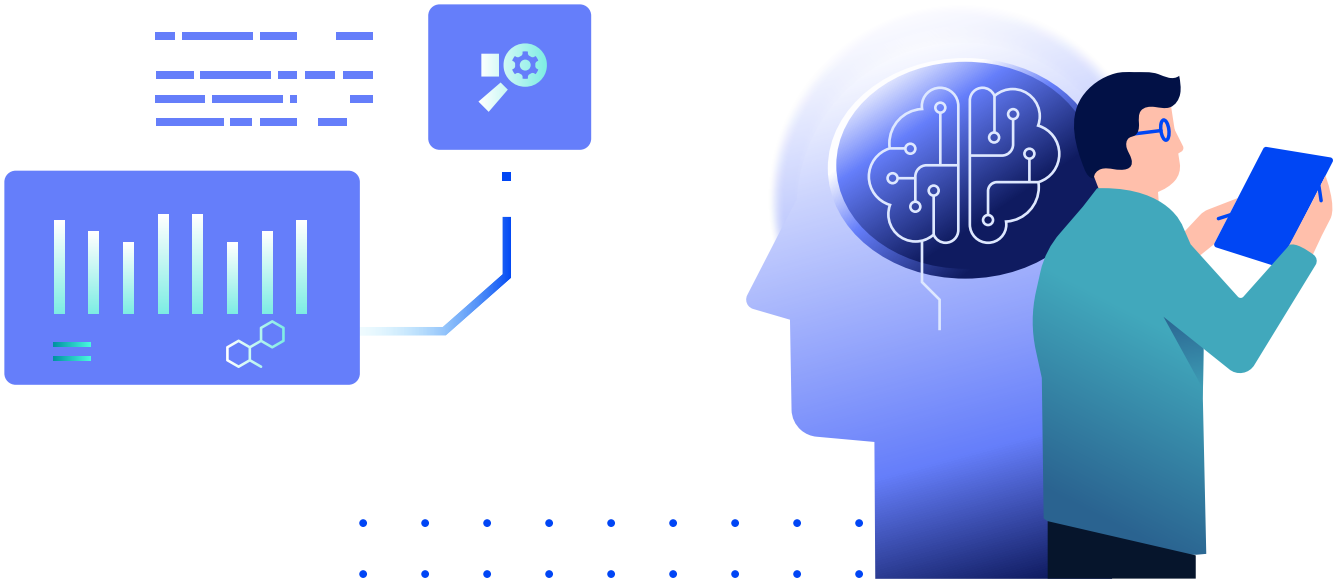
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2026 Editorial Calendar

Market Studies:

JANUARY

State of Generative & Agentic AI

JUNE

CX In 2030: Future Of The Omnichannel Contact Center

NOVEMBER

Modernizing Service Experiences With AI & Digital

NOVEMBER

Tech vs. Humanity: Redefining The Agent Role

Vertical Market Studies:

MARCH

Rethinking Banking, Finance & Insurance CX In The Age Of AI

MAY

Technology vs. Humanity in Healthcare & Patient Experiences

SEPTEMBER

Personalization & The Future Of Retail CX

OCTOBER

State of Customer Experience In Higher Education