

Transform the Agent Experience through AI Integration

AI seamlessly assisting human agents





Welcome



1

Understand the impact of AI on the agent role

2

Learn practical strategies for AI integration

3

Develop a comprehensive plan to improve agent satisfaction and AI adoption

4

Engage in interactive discussions to analyze AI impacts on key areas

Why is AI important in today's contact centers?

“Over 80% of customer interactions can be automated using AI, leading to significant cost reductions” *McKinsey*

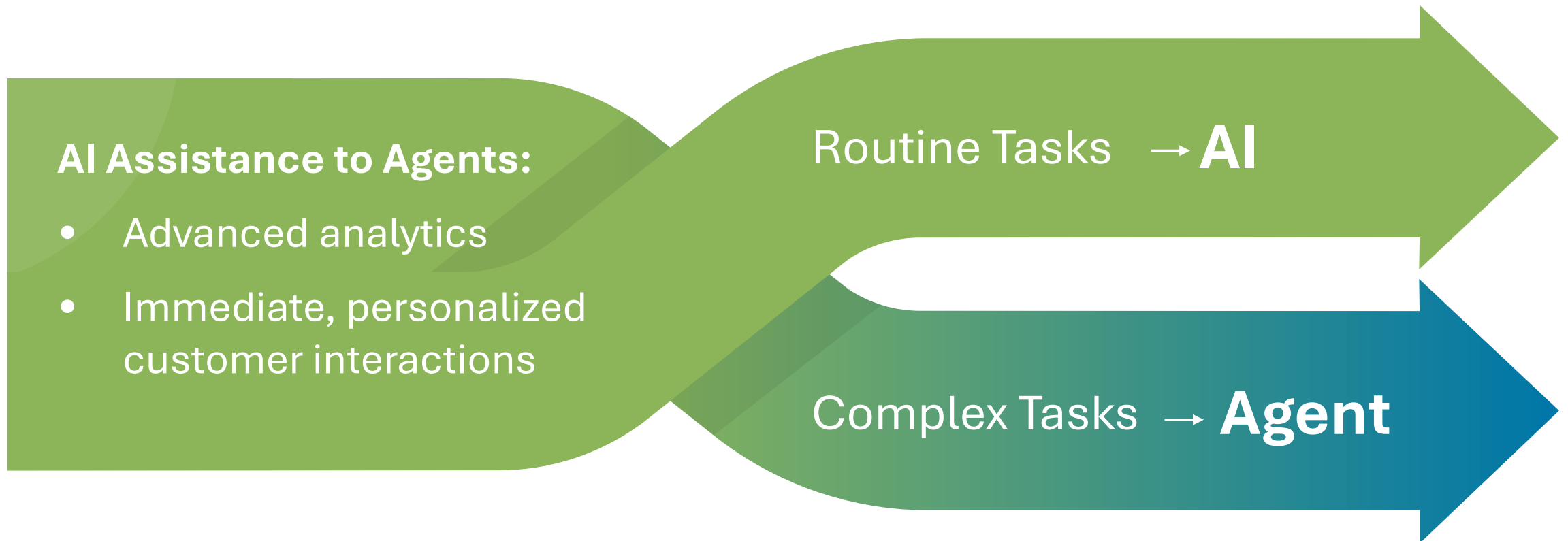
“AI improves response times and can boost customer satisfaction rates by 25%” *Gartner*

“63% of consumers expect companies to know their needs based on past interactions” *Salesforce*

“AI real-time recommendations can lead to a 15% improvement in first-call resolution rates” *Forrester*

“In regulated industries, AI-driven compliance monitoring is becoming a key tool” *PwC*

In addition to directing routine tasks to AI for handling,
AI can assist Agents with more complex tasks



A Digital Assistant is an AI-powered tool designed to assist agents in their day-to-day tasks

Real-Time Support

Contextual Assistance

- Suggest KB articles
- Troubleshooting prompts
- Appropriate responses

Automated Data Retrieval

- Customer information
- Order history
- Previous interactions



Task Automation

Routine Task Handling

- Log call details
- Update customer records
- Follow-up emails

Process Automation

- Trigger workflows
- Send info packets
- Initiate service requests



Knowledge Enhancement

Ongoing Training


- Continuous training
- Personalized content

Performance Feedback

- Agent feedback on analyzed conversations




Upskilling (Insurance Industry)

Allianz  has integrated AI into its customer service operations

- AI-driven chatbots
- Automated claims processing
- Agents require upskill in data interpretation and customer relationship management
- Routine inquiries handled by AI, with agents focused on complex tasks requiring deeper product knowledge and human empathy
 - Resolving customer disputes
 - Providing personalized insurance advice

Hybrid Roles (Telecom Industry)

 **vodafone** has adopted AI tools

- Digital assistants
- Machine learning algorithms
- AI handles repetitive queries, allowing agents to transition to hybrid roles
 - Agents manage customer interactions
 - Agents provide AI oversight
- Agents trained to supervise AI outputs to ensure quality and accuracy of responses
- Agents with a new blend of technical and interpersonal skills

Discussion

How has AI impacted the Agent experience?

*For those who have implemented AI,
share what you have learned*

*For those who hope to implement AI,
share what you expect*

Value-Added Tasks (Banking Industry)

BANK OF AMERICA  uses an AI-driven virtual assistant to handle routine banking tasks


- Account balances
- Transfer funds
- Account alerts

Agents more engaged in

- Financial advisory roles
- Investment decisions
- Financial planning

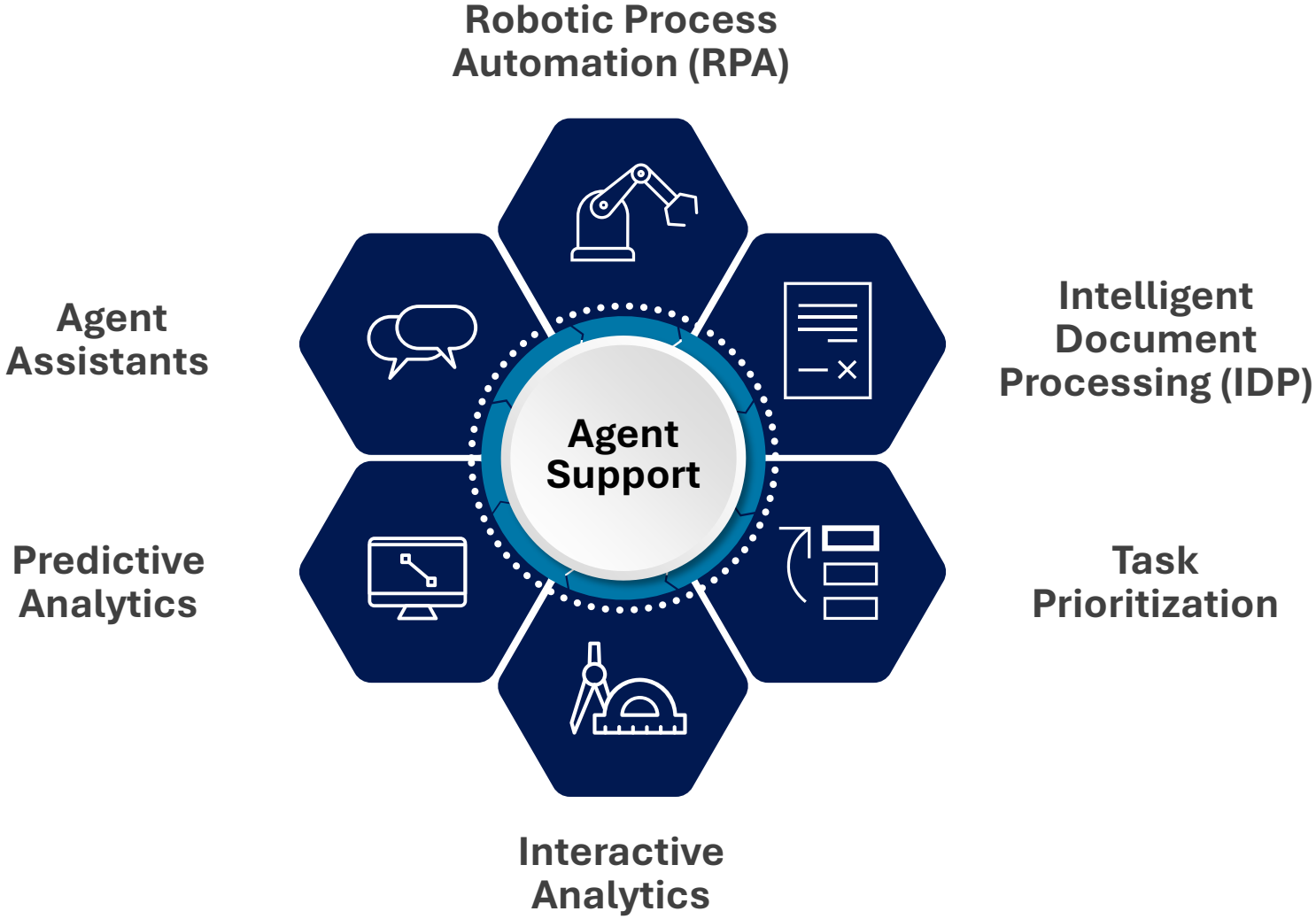
**Improves service quality
and customer relationships**

AI and Skill Enhancement (Professional Services)

 **accenture** integrated AI into service delivery

- Data Entry
- Preliminary analysis
- Frees up consultants and service agents
 - Higher-level problem-solving
 - Develop client strategies
 - Manage projects

**Invested in enhancing analytical
and technical skills of staff**





How do we prepare for AI changes?

How do we prepare Agents?

How do we ensure AI adoption success?



AI Project

1

2

3

4

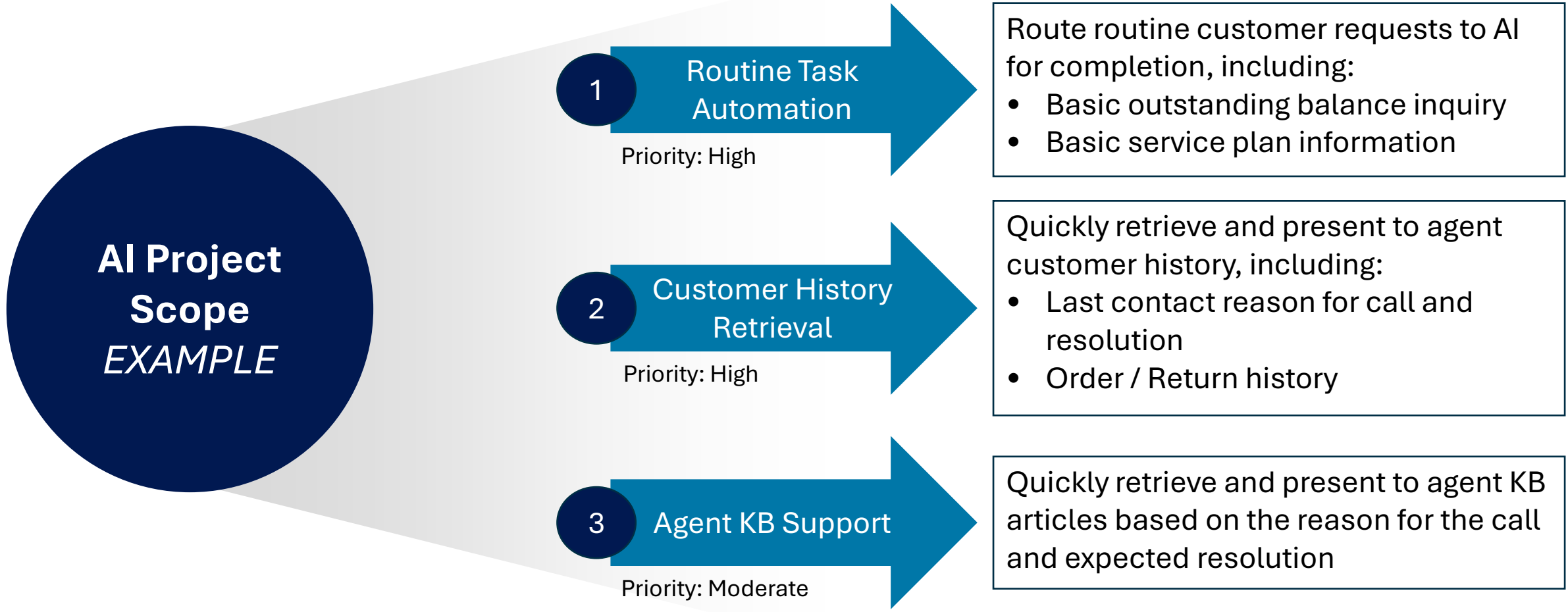
Define
AI Project
Scope

Identify
AI Impact
by Group

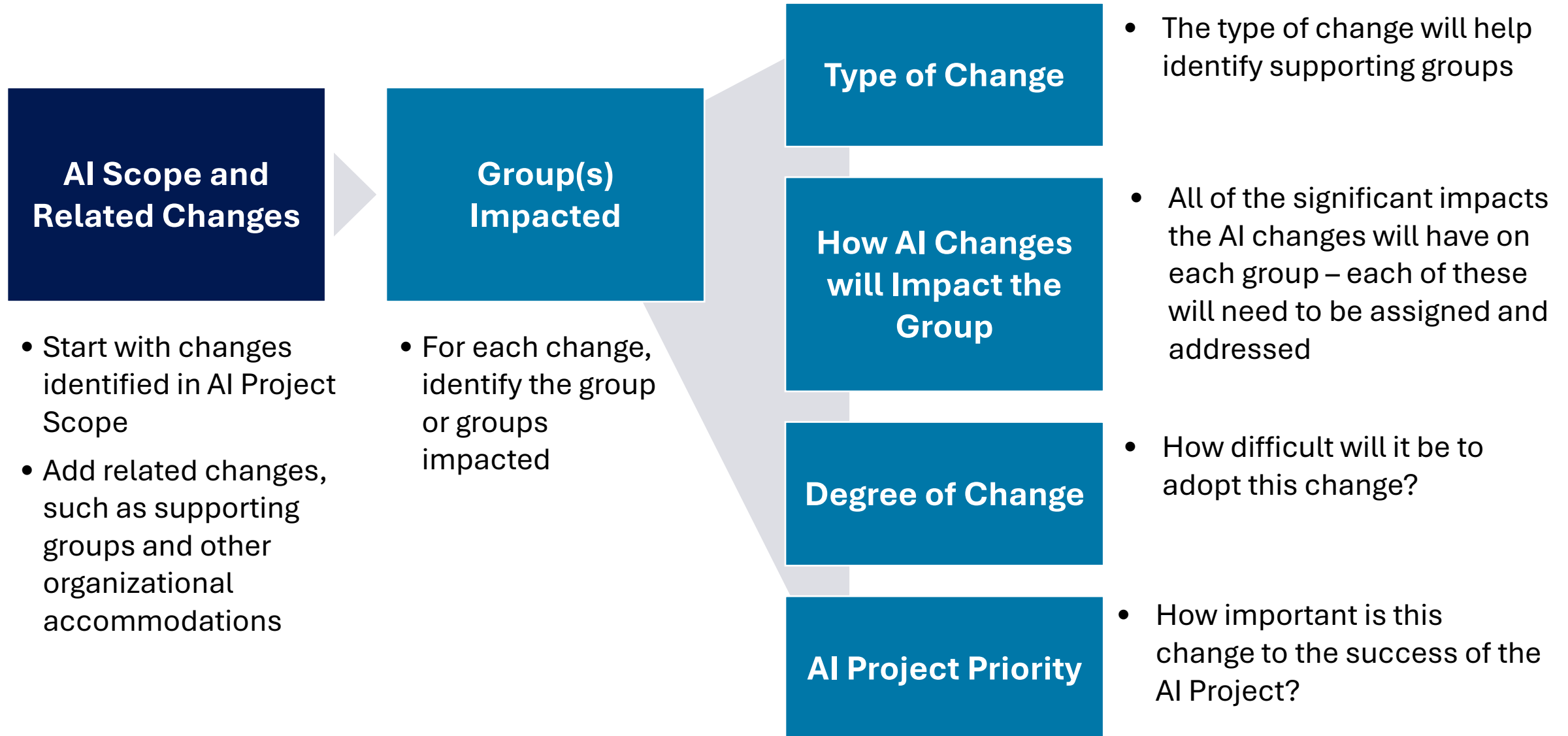
Address
Impact of
AI Changes

Analyze
and
Improve





Step 2: Identify AI Impact by Group



Step 2: Identify AI Impact by Group, Example (Agent Impact)



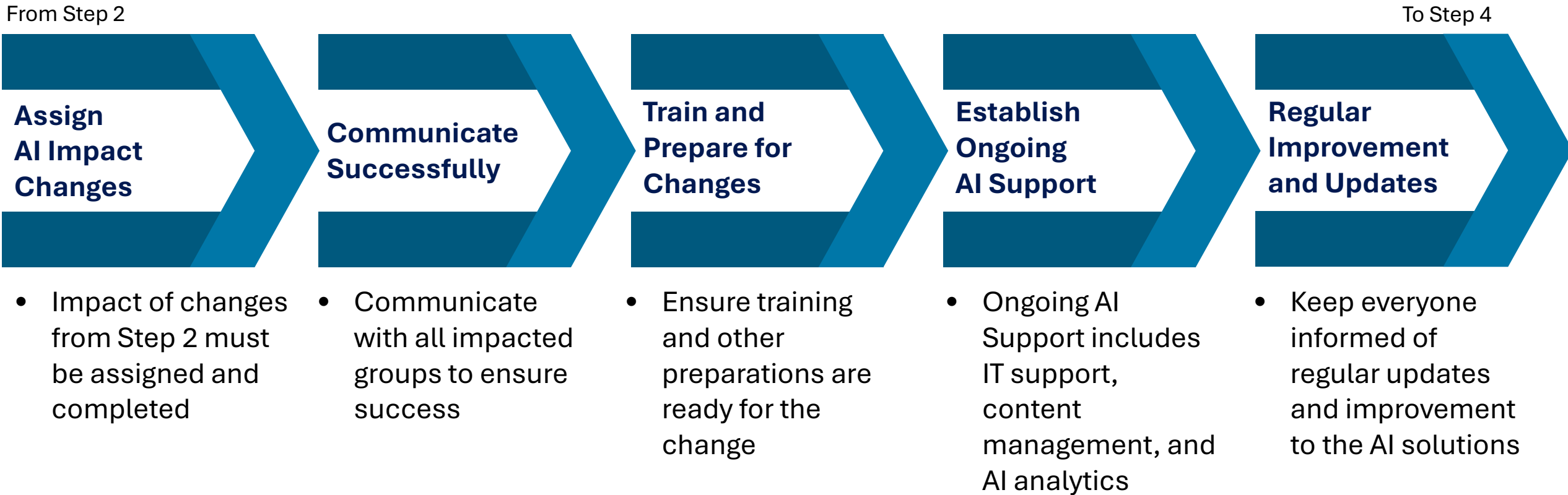
| | AI Scope and Related Changes | Group Impacted | Type of Change | How AI Changes will Impact the Group | Degree of Change | AI Project Priority |
|---|-----------------------------------|----------------|-------------------|--|------------------|---------------------|
| 1 | Routine Task Automation | Agents | Volume Call Types | <ul style="list-style-type: none"> Reduce overall call volume, staff reduction Increase % of complex calls Handle calls routed from AI after routine task or if customer dissatisfied with AI | High | High |
| 2 | Customer History Retrieval | Agents | Systems, Info | <ul style="list-style-type: none"> System change to accommodate more customer history visible from AI for agents | High | High |
| 3 | Agent KB Support | Agents | Systems, Info | <ul style="list-style-type: none"> View suggested KB articles based on type of call and expected resolution | Low | Moderate |

Step 2: Identify AI Impact by Group, Example (Support)



| AI Scope and Related Changes | Group Impacted | Type of Change | How AI Changes will Impact the Group | Degree of Change | AI Project Priority |
|-------------------------------|------------------------------|------------------|--|------------------|---------------------|
| Call Routing | Workforce Management | Call Routing | <ul style="list-style-type: none"> Update call routing to leverage AI Re-forecast agent staffing accordingly | Moderate | High |
| Ongoing AI Maintenance | KB Support | AI Content | <ul style="list-style-type: none"> AI Analysis new to this role Ongoing AI content updates | High | High |
| All Changes | Training | Design, Delivery | <ul style="list-style-type: none"> Update training for AI changes Schedule training delivery | Moderate | High |
| Agent Changes | Performance Reporting | Design | <ul style="list-style-type: none"> Update performance metrics, tracking and reporting | Low | High |
| Staff Reduction | Human Resources | Reduce Staff | <ul style="list-style-type: none"> Manage attrition and staff reduction | High | High |
| Agent Profile | Recruiting | Min Skills | <ul style="list-style-type: none"> Update minimum skills required of agents | Moderate | Moderate |

Step 3 – Address Impact of AI Changes

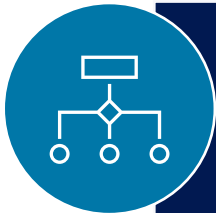




Set a common vision of the collective benefits to the organization



Establish the roadmap for change and set clear expectations among key stakeholder groups



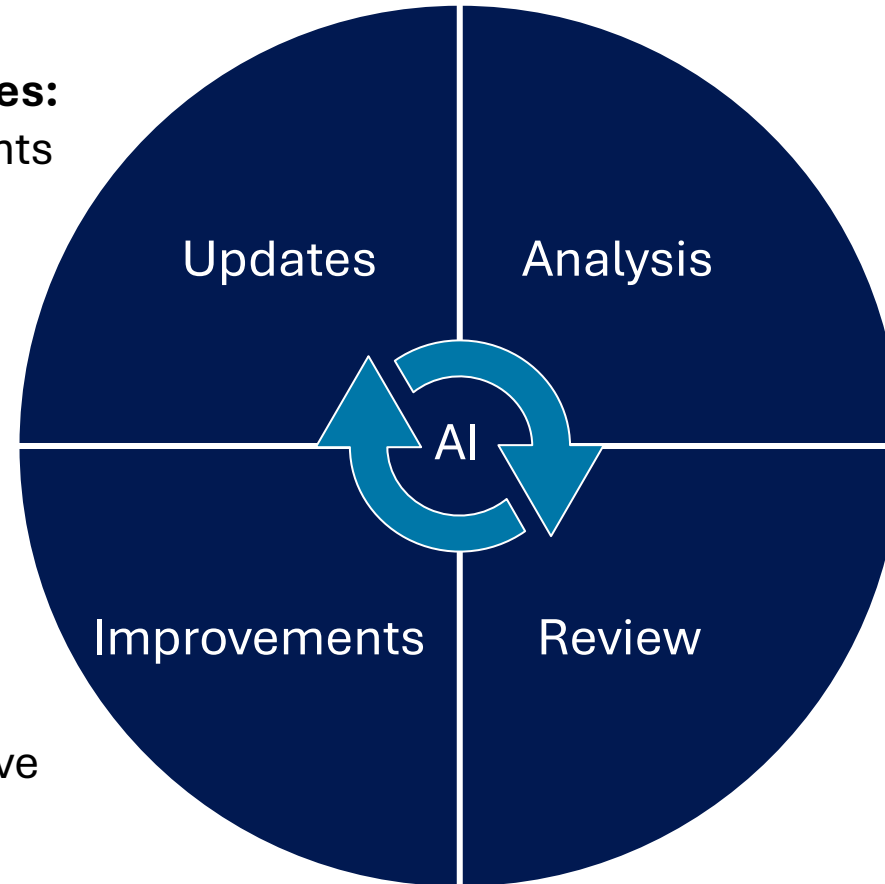
Prepare the organization to adapt to the changes required for a **successful outcome**



Communicate critical information, tailored to the timing and expected change for each group

4. Communicate and Train Updates:

- Regular updates on improvements to AI and goals for future changes



1. Analysis of AI performance:

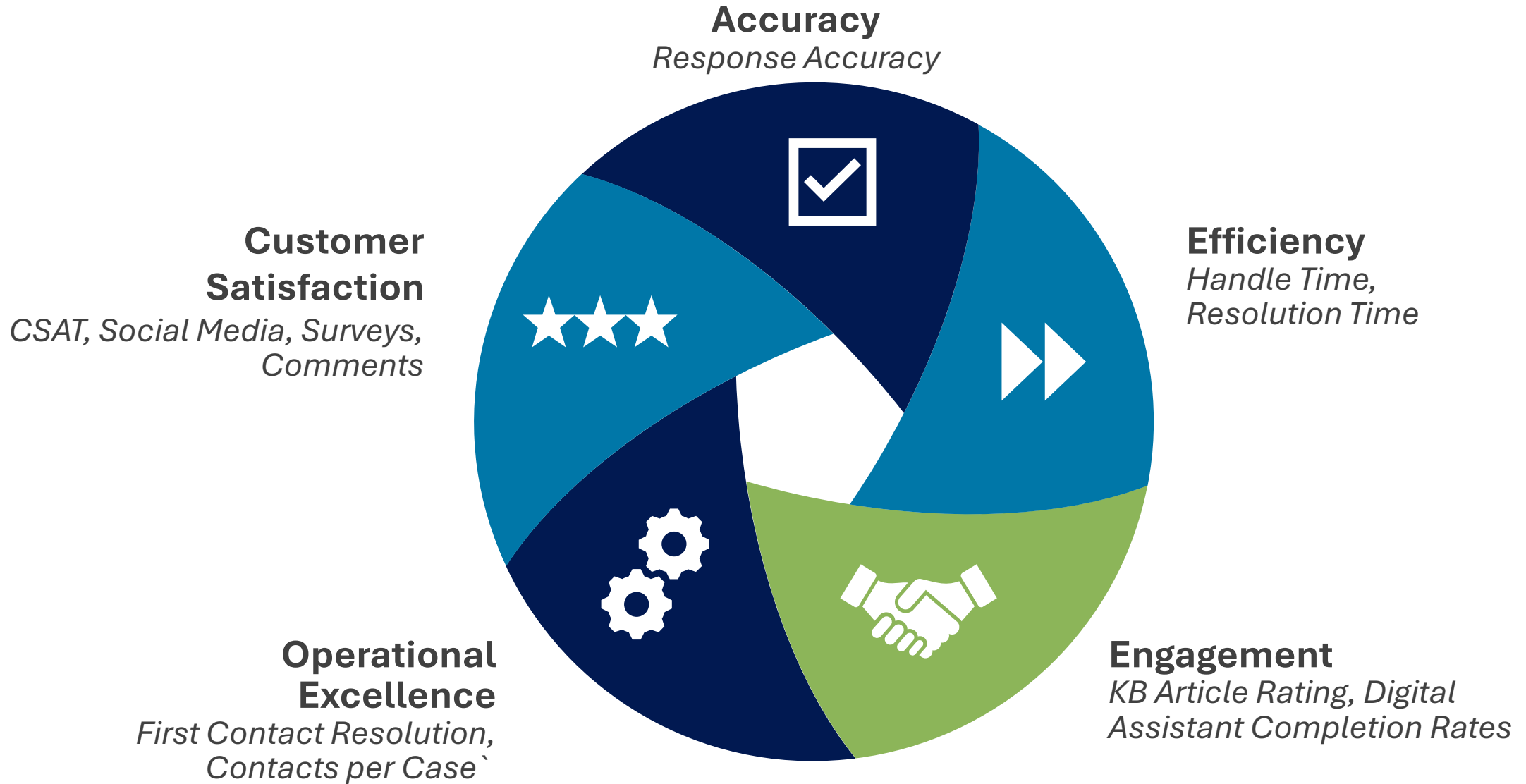
- AI solutions performing as required
- Impact on customer satisfaction

2. Review of AI performance:

- Agent workshops to review feedback on use of AI
- Ethics reviews to ensure compliance

3. Refine and Improve AI:

- Make corrections
- Refine solutions
- Expand AI solutions to improve efficiency, CSAT, etc.



We are all working on a **new AI Project together**

You are about to breakout into **5 groups**

Each group will handle **one question for 15 minutes**

- The topics are listed on the next page

Be prepared to share your ideas with the full group

Class Activity



1. Agent Skills and Knowledge Requirements

How does integration with AI change the skills and knowledge required of agents?

2. Recruitment and Training

How does integration with AI affect recruitment and training processes?

3. Agent Metrics and Performance Management

How should performance metrics adapt to AI integration?



5. Agent Perceptions of AI Integration

What agent attitudes would you expect towards AI, and how can AI acceptance be improved?

4. Staffing Requirements

How will staffing levels and workforce planning be impacted by AI integration?

New Roles to Consider with AI



| Role | Responsibilities |
|--------------------------------------|---|
| AI Oversight & Management | Oversee AI operations and ensure systems are performing as expected |
| Technical: Bot Creator | Design and develop AI chatbots and virtual assistants |
| Technical: Bot Tuner | Analyze bot performance and customer feedback to make improvements |
| Technical: Bot Manager | Oversee performance and effectiveness of AI customer interactions |
| AI Trainer | Train AI systems, and update AI systems regularly with new data and insights |
| AI Ethics Officer | Ensure AI implementations comply with ethical standards and regulations; monitor for bias and ensure transparency |

1. Pinpoint Key Use Cases and Identify Quick Wins



Immediate, high-impact areas

2. Involve Agents in Design and Testing



Workshops, pilot groups

3. Hands-on Training and Onboarding



Scenario-based training

4. Gradual Integration and Scaling



Introduce AI solutions in stages

5. Regular Monitoring and Feedback Loops



Agent dashboards

6. Encourage using AI as a Collaborative Tool



Share success stories

7. Address Concerns with Practical Solutions



Transparency in how AI is used

8. Recognize and Reward AI Adoption



Incentives for early adopters

- **Planning and agent involvement** are critical for successful AI adoption and ongoing improvements
- Automate routine tasks, allowing **agents to focus on more complex** and meaningful interactions with customers
- Encourage the development of **hybrid roles** where agents help to improve AI systems
- Agents need **new skills** such as data analysis, problem-solving, and emotional intelligence
- Implement **technical Agent training** on AI systems along with soft skills for handling complex customer issues
- Redefine **performance metrics** to reflect the new AI-augmented work environment



Thank you!

