

Pilot with precision: Aligning generative agent pilots to risk tolerance and ROI



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Agenda

- 01 Why generative AI pilots succeed or fail
- 02 The AI innovation tolerance model in the contact center
- 03 Selecting the right use cases
- 04 Best practices
- 05 Actions to take to start a successful pilot

Innovation Tolerance Model

	Foundational (Low)	Pilot (Moderate)	Operational (High)	Transformational (Very High)
Culture	Sr. leaders use “innovation” as a shortcut; psychological safety is not present; compliance-driven, risk-averse	Sr. leaders talk about the importance of innovation but do not actively promote it; cautious but curious; willing to pilot	The CEO encourages everyone to think differently and propose new innovative ideas; data-driven; sees AI as strategic	C-suite empowers their talented people to solve complex issues using AI; innovation-first; embraces disruption
AI Role	Scripted bots handling FAQs; minimal or no generative AI capability	Guardrailed gen AI for limited transactions; simple multi-turn conversations using context	Handles more complex, contextual transactions; multiple use cases expanded across org	Autonomous agents; predictive engagement; self-learning at scale across many interactions
Org Design	Top-down “tiger teams” formed to “think outside the box” but constrained by rules; no AI governance	Centralized control; limited innovation teams; emerging AI governance but not widely adopted	Formal AI governance in place; cross-functional CX & IT teams empowered with autonomy and budgets	Teams operate like subsidiaries with their own P&L; adaptive AI governance integrated into all decision-making
Budget	Projects funded only with proven ROI; overall innovation funding is scarce	Small, inconsistent budgets earmarked for pilots; funding tied to “safe bets”	Dedicated budget for innovation; employees can pitch ideas; significant investment in compliance and infrastructure	Innovation funded like venture capital; major strategic AI investments; AI is core to operations
People	Little-to-no in-house AI expertise; collaboration confused with consensus; people judged on how others “feel” about performance	Initial AI upskilling; vendors heavily involved in pilots; human-in-the-loop oversight on new projects	Dedicated AI specialists (ops & technical SMEs); performance tied to impact on strategic goals; humans intervene only on exceptions	Workforce broadly reskilled; teams judged on outcomes and contribution to mission; AI talent deeply embedded across functions
Risk/ROI	Low technical risk but high CX risk (failure erodes trust); minimal ROI beyond basic efficiency	Moderate risk with strong controls; early measurable ROI in AHT, CSAT, containment, FCR	Moderate-to-high risk but offset by mature controls; high ROI with improved accuracy, CX outcomes, and operational efficiency	High potential risk if governance lapses; very high ROI as AI drives scalability, CX differentiation, and major OPEX savings

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