

Your Customer Already Told Us

Building Memory Into the Agent Ecosystem



Customer Response Summit, Execs In The Know
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Your Speaker



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FireSide Chat



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AI is not just the future.

**It's already shaping our
present reality.**

“AI will be the most transformative technology of the 21st century. It will affect every industry and aspect of our lives. “

Jensen Huang, CEO NVIDIA

“97% of enterprises view AI as important tools for achieving business goals, though only 1% have reached a ‘ubiquitous’ level of maturity.”

Frost & Sullivan, Global AI Maturity Survey

“Up to **88% of AI POCs fail** to reach production, or fail to provide the intended ROI.”

International Data Corporation (IDC) Research

Why most AI projects fail?

Agentic



Accuracy

Agentic First Solutions

Accuracy First Solutions

Sounds good

Responds correctly

Optimized for Demos

Optimized for Production

Break under Production Use

Predictable repeatable behaviour

Speed, volume, and cost pressures vary.

Accuracy should not.

“Technology leaders expect GenAI implementations to improve agent performance metrics by **58%** and reduce average handle time (AHT) by **56%**.”

Frost & Sullivan

The Call Transfer Problem

The Broken Customer Journey

Bot collects customer info & after 5 mins

Chatbot: "I'm unable to help with that. Let me transfer you to an agent."

Customer enters phone queue with no context carried over

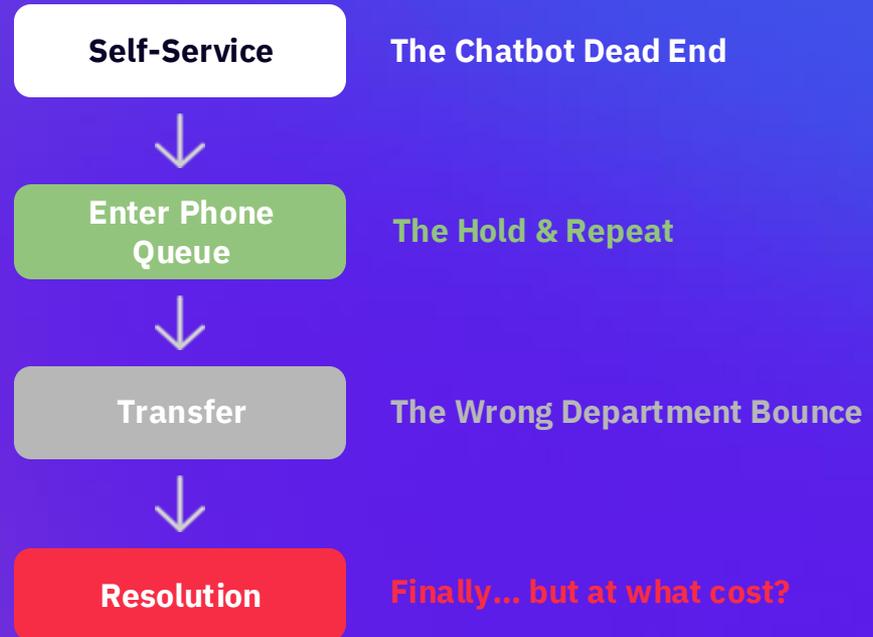
Agent 1: *picks up* "Can you tell me what you're calling about?"

Customer gets transferred with no context carried over

Agent 1: "Oh, that's actually handled by our billing team. Let me transfer you now."

Agent 2: "How can I help you today?"

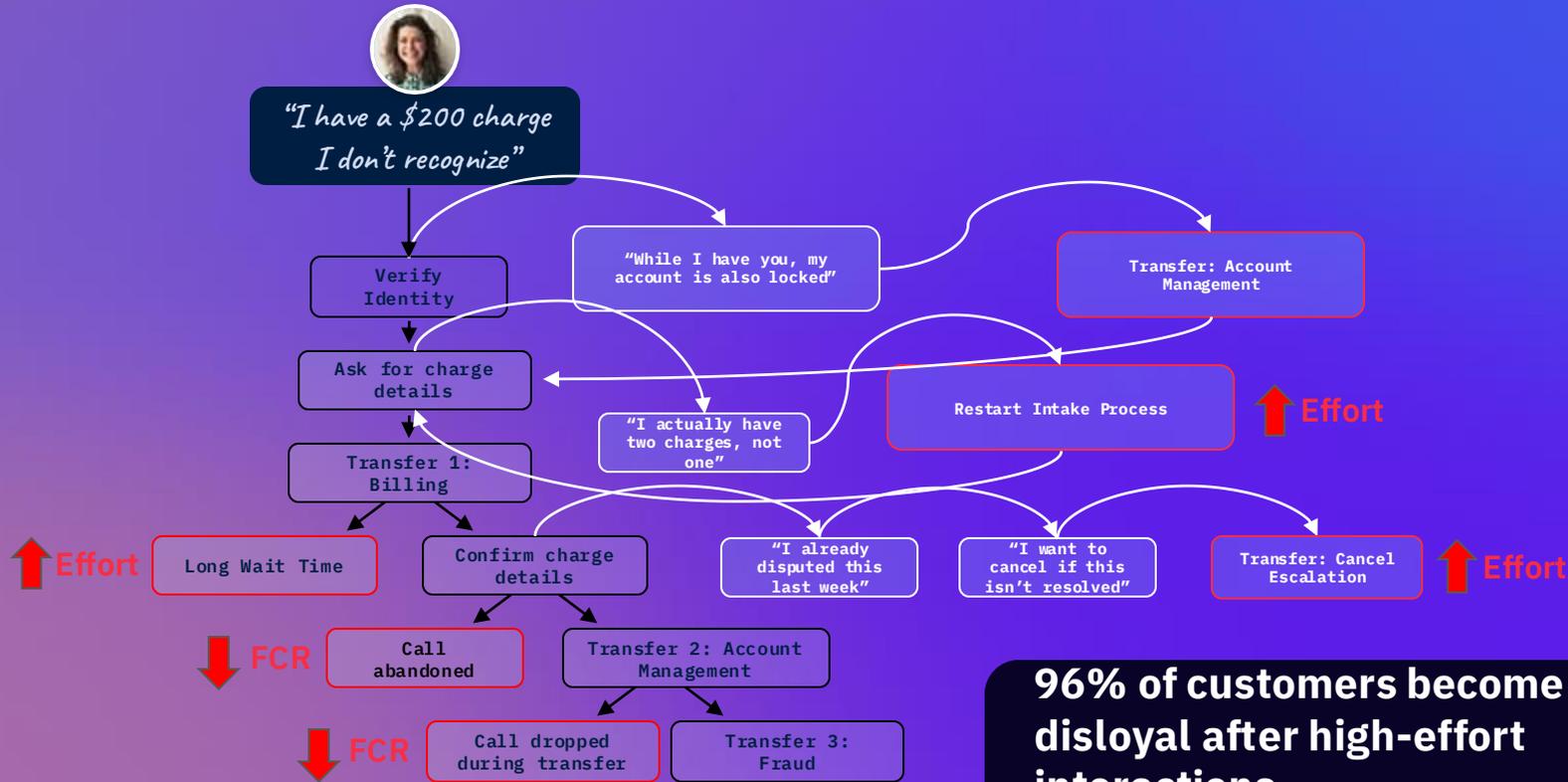
The issue itself took **2 mins to fix** but the broken journey resulted in **3 transfers, 3 repeats**, and a whole lot of **added effort**



“62% of customer service channel transitions are “high-effort” for customers. Customers who experience seamless transitions from self-service to a rep spend 27% less time in assisted channels.”

Gartner

The Real Problem



96% of customers become disloyal after high-effort interactions.
Gartner

More AI \neq Better CX

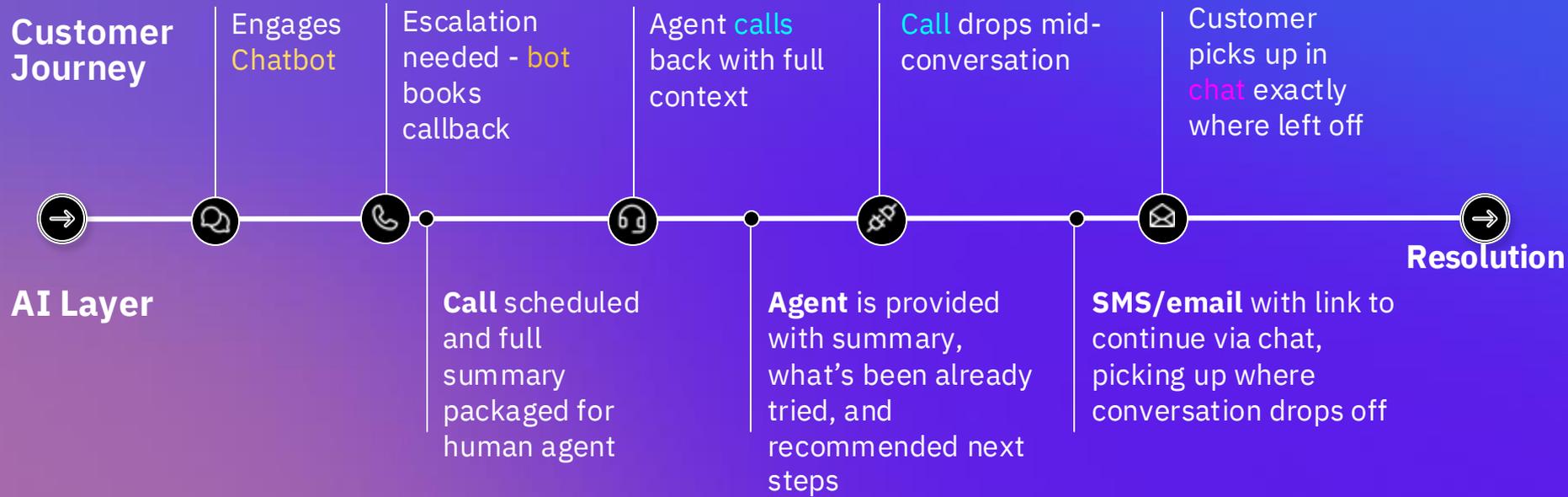
“74% of customer who experience **easy transitions to a rep** say they’ll return to self-service.”

Gartner

Single Ongoing Conversation



AI Reduces Effort at Each Touchpoint



Unifying Data & Sharing Memory for **Effortless Transitions**, even across Channels

The Three Zones

Autonomous

Collaborative

Escalate

When AI Should Just Act (*self service*)

Autonomous Zone •

- **Customer:** "What's my account balance?"
 - ✓ Known customer
 - ✓ Clear intent
 - ✓ No risk
 - ✓ Complete information
 - Autonomous action

Collaborative Zone •

When AI Should Coordinate

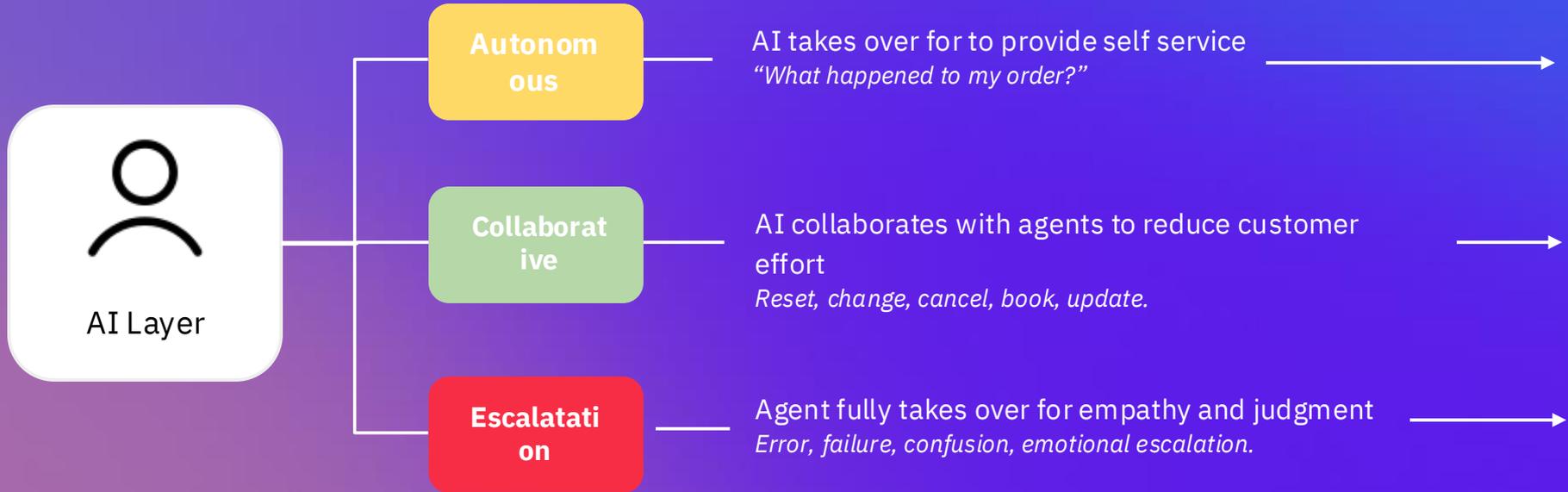
- **Customer:** "I was charged twice but my card shows fraud alert"
- **Requires:** Billing + Account systems + Fraud
- → **AI orchestration** coordinates across systems to lower effort at each touchpoint
 - Collects information from system & customer for expected transfers
 - Shares relevant information and context between each transfer

Escalation Zone •

When Humans Must Decide

- **Customer:** "My mom passed away, I need to close her account"
- **Requires:** Empathy, judgment, exception handling
- **AI prepares:** Account summary, outstanding items, required forms
- **Human handles:** The actual conversation and decision

AI Coordinates the Journey



The before & after: Same issues, different experiences

Before



8 contacts



47 minutes



3 transfers

After



3 contacts



12 minutes



0 transfers

How does this
work at **scale**?

Fireside Chat with Vikas Bhambri

Practical Takeaways

F. E. A. T. Principles

The Foundation for Effective AI Governance

Fairness

Examine training data to identify and eliminate potential amplification of societal and institutional biases.

Empathy

Address ethical concerns, implications, and practices of AI development, deployment, and workplace policies, that might impact our constituents.

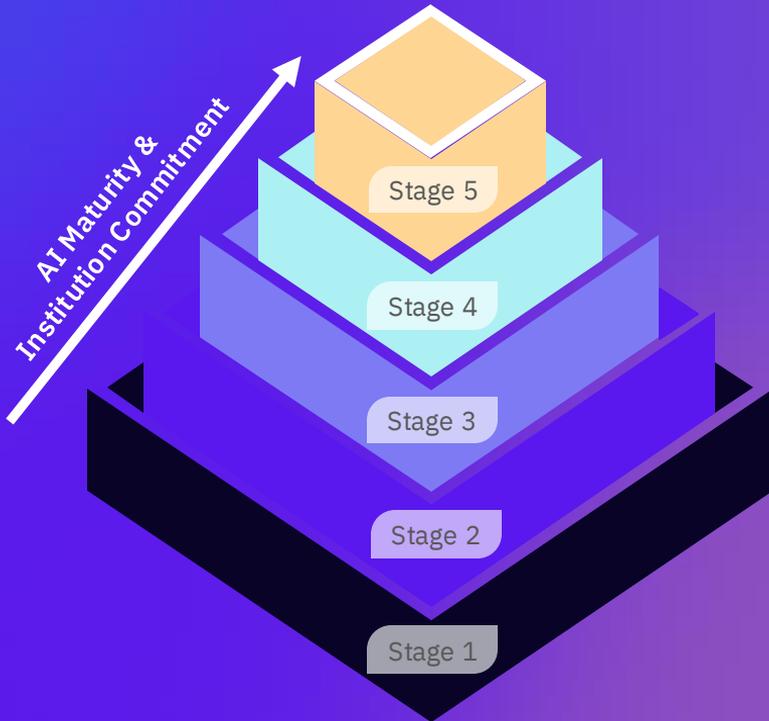
Accountability

Encourage regular auditing practices and assessments on machine learning models and AI-enabled tools.

Transparency

Proactively provide documentation, training data, and root cause analysis (RCA), and clearly communicate overall AI governance policies.

AI Governance Maturity Model



Stage 5: Transformational
Governance at Scale

Stage 4: Systemic
Integrated into All Key Business Processes

Stage 3: Operational
Building Infrastructure

Stage 2: Active
Building Practice

Stage 1: Exploring
Building Awareness

Framework

Strategy & Ownership

Criteria	1	2	3	4	5
Clear business outcomes defined	<input type="checkbox"/>				
Executive owner assigned	<input type="checkbox"/>				
Success metrics agreed	<input type="checkbox"/>				
Bot included in operating model	<input type="checkbox"/>				
Funding and accountability clear	<input type="checkbox"/>				

Use Case Readiness

Criteria	1	2	3	4	5
Top 5–10 intents identified	<input type="checkbox"/>				
Volumes validated	<input type="checkbox"/>				
Processes documented	<input type="checkbox"/>				
Exceptions understood	<input type="checkbox"/>				
Customer impact assessed	<input type="checkbox"/>				

Process & Data

Criteria	1	2	3	4	5
Processes are stable	<input type="checkbox"/>				
Data is accurate and accessible	<input type="checkbox"/>				
Knowledge is current	<input type="checkbox"/>				
Authentication approach defined	<input type="checkbox"/>				
Rework drivers known	<input type="checkbox"/>				

Technology Enablement

Criteria	1	2	3	4	5
Bots can complete transactions	<input type="checkbox"/>				
Systems can be updated in real time	<input type="checkbox"/>				
Agent handoff supported	<input type="checkbox"/>				
Monitoring tools in place	<input type="checkbox"/>				
Scalability confirmed	<input type="checkbox"/>				

Agent & Change Readiness

Criteria	1	2	3	4	5
Agents informed and trained	<input type="checkbox"/>				
Supervisors aligned	<input type="checkbox"/>				
New roles defined	<input type="checkbox"/>				
Resistance risks addressed	<input type="checkbox"/>				
Communications plan ready	<input type="checkbox"/>				

Measurement & ROI

Criteria	1	2	3	4	5
Baseline metrics captured	<input type="checkbox"/>				
Financial model built	<input type="checkbox"/>				
Repeat contact tracked	<input type="checkbox"/>				
Cost per resolution measured	<input type="checkbox"/>				
Executive dashboard planned	<input type="checkbox"/>				

Governance & Risk

Criteria	1	2	3	4	5
Policy approved	<input type="checkbox"/>				
Compliance controls defined	<input type="checkbox"/>				
Security review completed	<input type="checkbox"/>				
Audit process ready	<input type="checkbox"/>				
Incident response defined	<input type="checkbox"/>				

Scoring Guidance

30–35: **Ready to pilot**

25–29: **Ready with targeted remediation**

20–24: **High risk – fix gaps before launching**

< 20: **Not ready – redesign approach**

Thank you!

Roger Lee

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