Five Considerations Before You Implement AI In Your Contact Center

With Industry Analyst and Contact Center Expert Blair Pleasant

Welcome to today's webinar! We will begin shortly.
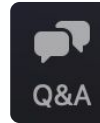
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Welcome to Today's Webinar!

Serge Rubinstein
Marketing Director
@ Balto

Lior Torenberg
Director of Research Content
@ Balto

Today's session will be about **45 minutes** with time for **Q&A**.

Use the **Q&A button** on your screen to submit questions.

All registrants will receive the **video recording** and **slides** following the broadcast.

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5 Considerations Before Implementing AI

1. Make sure you understand AI
2. Define your use case
3. Focus on the right metrics
4. Recognize the limitations of AI
5. Plan for proper change management in your organization

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Welcome, Blair!

Blair Pleasant

President and Principal Analyst, COMMfusion LLC
Co-founder of BCStrategies

COMMfusion
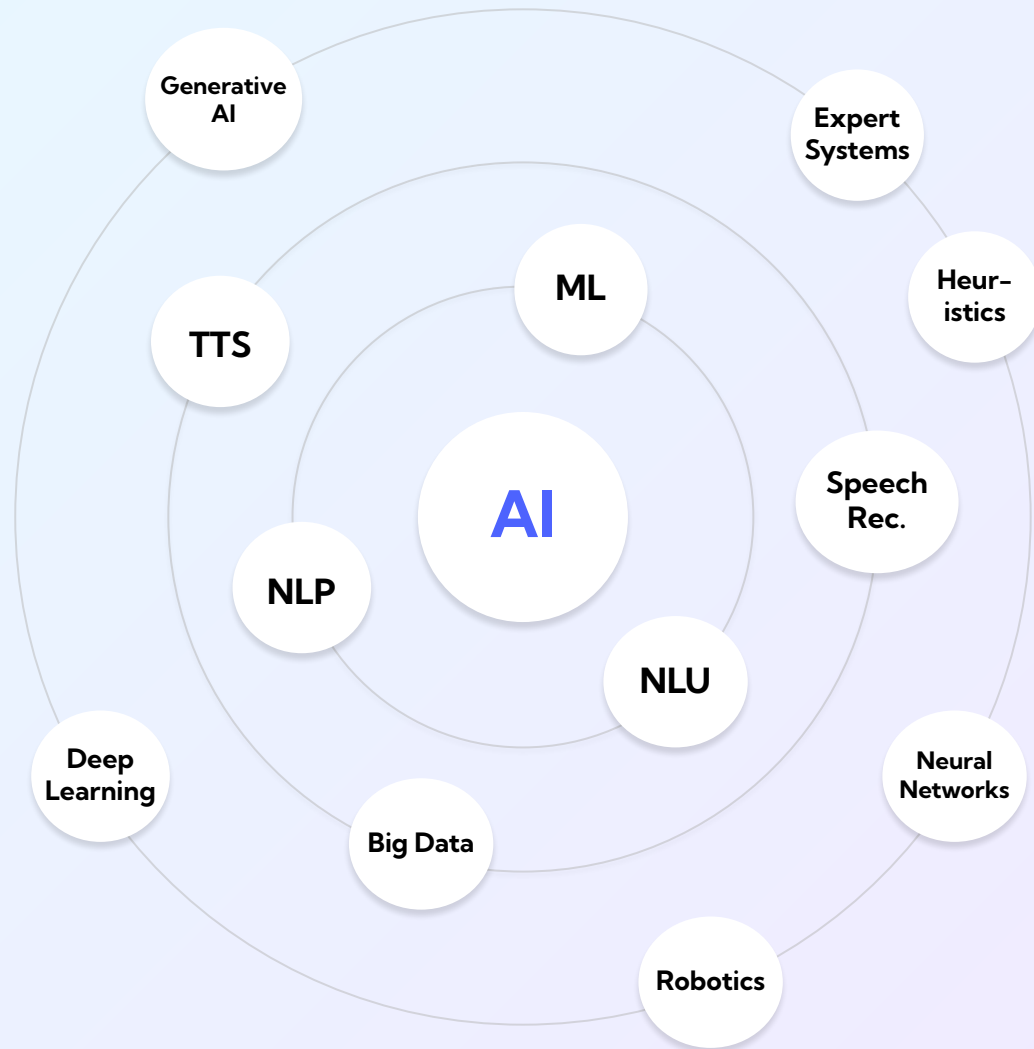
BCSTRATEGIES
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5 Considerations Before You Implement AI In the Contact Center

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AI will revamp the contact center and redefine the customer experience…

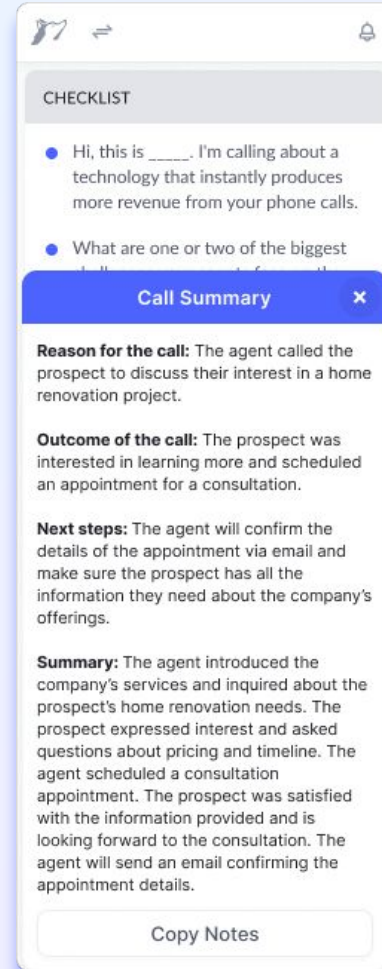... But everything we thought we knew about AI is changing, too.

Make Sure You Understand AI

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AI is an umbrella term

Generative AI

Expert Systems

ML

Heur-istics

TTS

AI

Speech Rec.

NLP

NLU

Deep Learning

Neural Networks

Big Data

Robotics

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Generative AI

▸ New & exciting, but will soon be table stakes in the contact center

▸ ChatGPT, Bard, etc.

▸ Applications:
- Call summarization
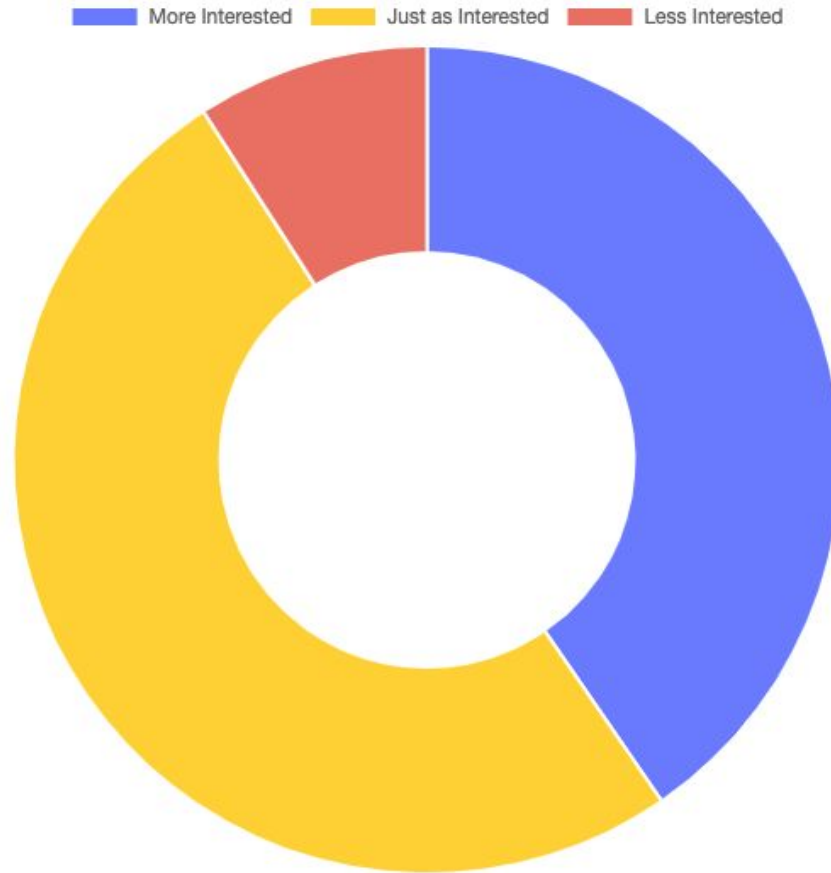- Chatbots
- Enhance agent assist
- QM
- Knowledge base

CHECKLIST

● Hi, this is _____. I'm calling about a technology that instantly produces more revenue from your phone calls.

● What are one or two of the biggest

Call Summary ✕

Reason for the call: The agent called the prospect to discuss their interest in a home renovation project.

Outcome of the call: The prospect was interested in learning more and scheduled an appointment for a consultation.

Next steps: The agent will confirm the details of the appointment via email and make sure the prospect has all the information they need about the company's offerings.

Summary: The agent introduced the company's services and inquired about the prospect's home renovation needs. The prospect expressed interest and asked questions about pricing and timeline. The agent scheduled a consultation appointment. The prospect was satisfied with the information provided and is looking forward to the consultation. The agent will send an email confirming the appointment details.

Copy Notes

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Figure 12: AI Tool Utilization in Contact Centers

Define Your Use Case

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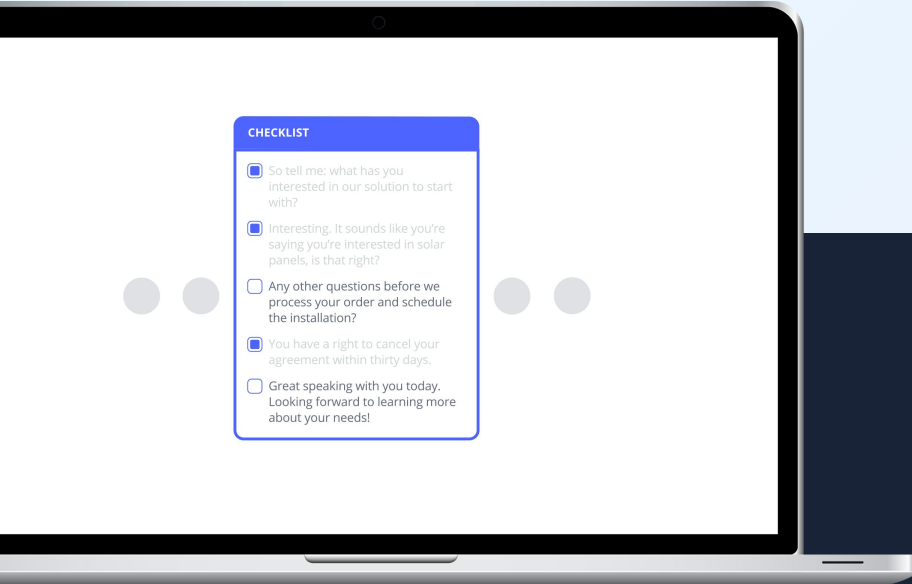# AI Use Cases in the Contact Center

Customer-Facing

- Knowledge base
- Intelligent call routing
- Chatbots
- Self-service
- Conversational AI

Agent-Facing

- Call guidance
- Agent assist
- After-call work
- Coaching/training
- Sentiment analysis

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Top AI Use Cases Today

▸ Guidance & coaching
▸ Chatbots
▸ IVA (voice)
▸ Call analytics
▸ Call summarization
▸ Agent assist
▸ Sentiment analysis
▸ WEM/WFO

▸ Intelligent call routing
▸ Predictive analytics
▸ Identity verification/fraud detection
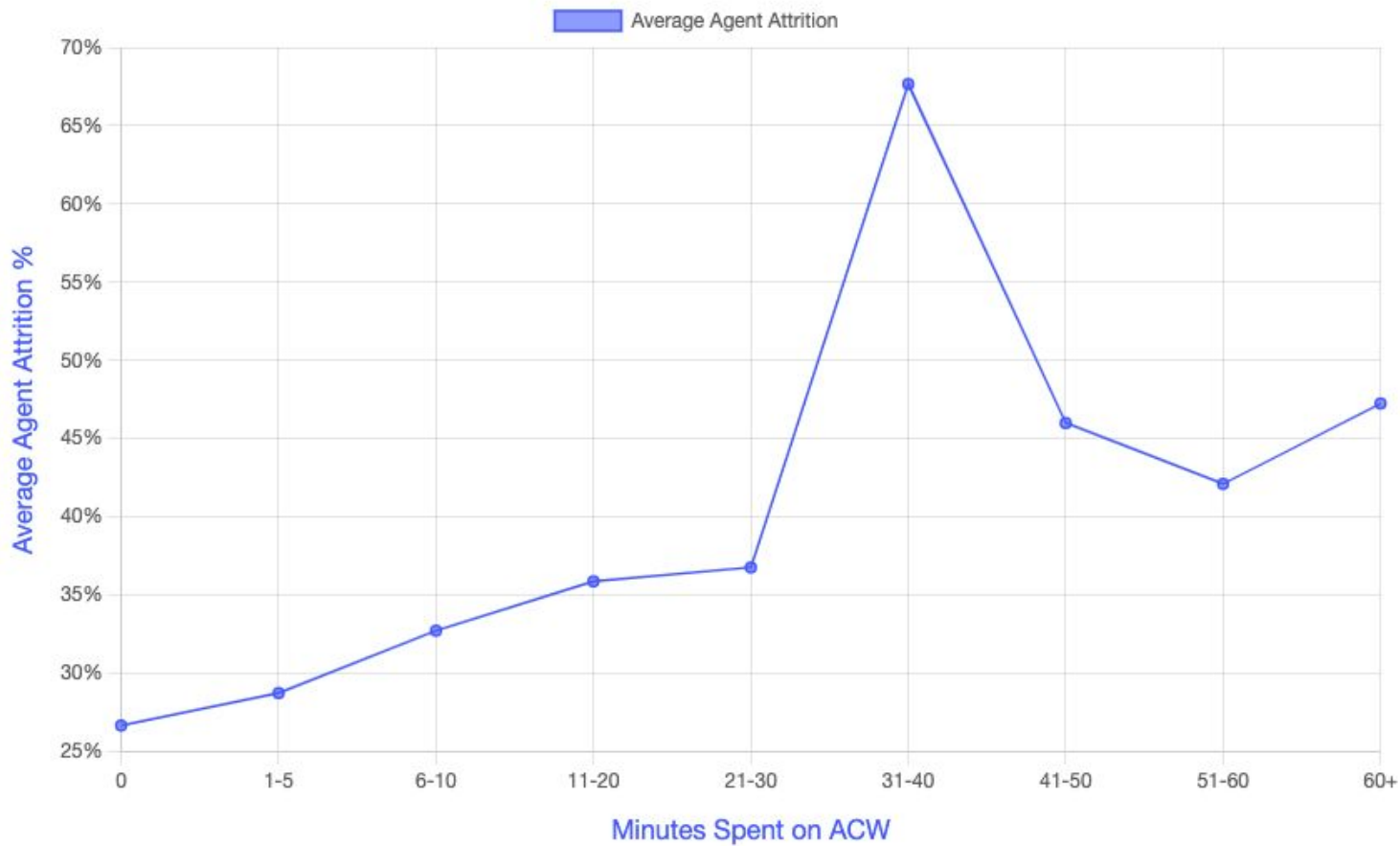▸ Real-time language translation
▸ Proactive customer service

CHECKLIST

☑ So tell me: what has you interested in our solution to start with?

☑ Interesting. It sounds like you're saying you're interested in solar panels, is that right?

☐ Any other questions before we process your order and schedule the installation?

☑ You have a right to cancel your agreement within thirty days.

☐ Great speaking with you today. Looking forward to learning more about your needs!

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Figure 19: The Relationship Between ACW and Agent Attrition

Focus On The Right Metrics

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Don't Boil The Ocean
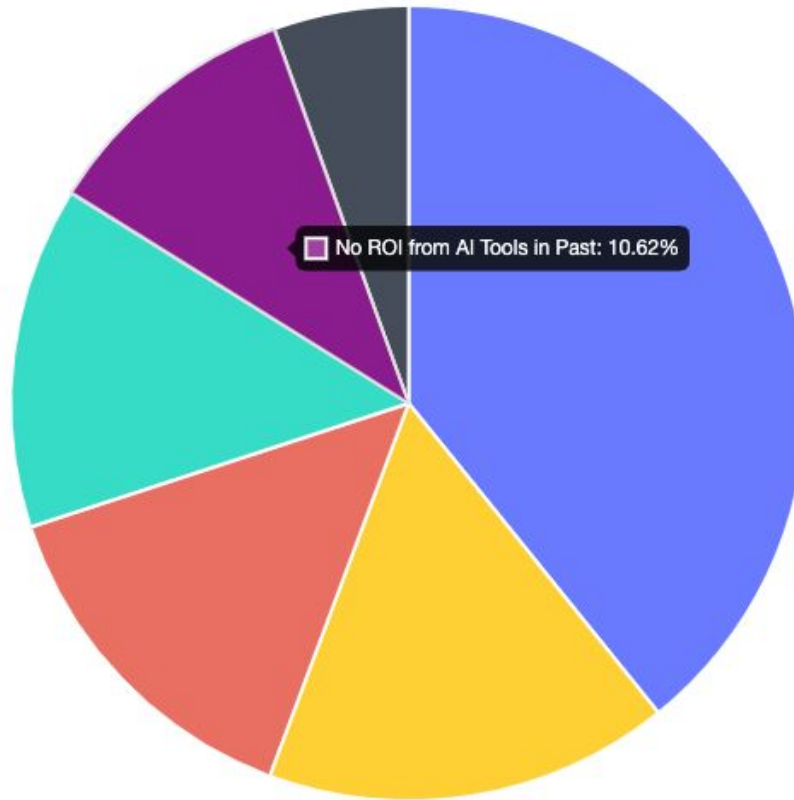
Figure 17: Why Don't You Use AI Technology Today?

1. Pick one metric
2. Isolate your approach
3. Start small
4. Track improvements
5. Socialize new technology

1. Pick one metric –> CSAT
2. Isolate your approach –> Agent guidance
3. Start small –> New cohort of 20 agents that was just onboarded
4. Track improvements –> Track CSAT over 3 months
5. Socialize new technology –> Implement to all agents

Recognize The Limitations of AI

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Common Barriers & Challenges

- Where do I start?
- How do I start?
- Is it usable and user-friendly?
- Will it integrate with my existing systems?
- How will I calculate ROI?
- Will it be prohibitively expensive?
- Are my people skilled enough to implement it?
- Will my customer data be secure?
- How long will it take to deploy?
- Is it accurate? Is it biased?

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Customer Perspective

"We don't have the resources and skilled people to deploy AI. It's too complex and I don't know where to start."

"I tried chatbots and they didn't work – our customers just wanted to talk to live agents, not a robot."

"Our agents don't like having AI tell them how to do their job. And they definitely don't want an AI to take their job away."

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Figure 17: Why Don't You Use AI Technology Today?

Legend:
- Planning to Implement AI Tool in Next 12 Months
- Not Interested in AI
- Interested in AI But Superiors Are Not
- AI is Too Expensive
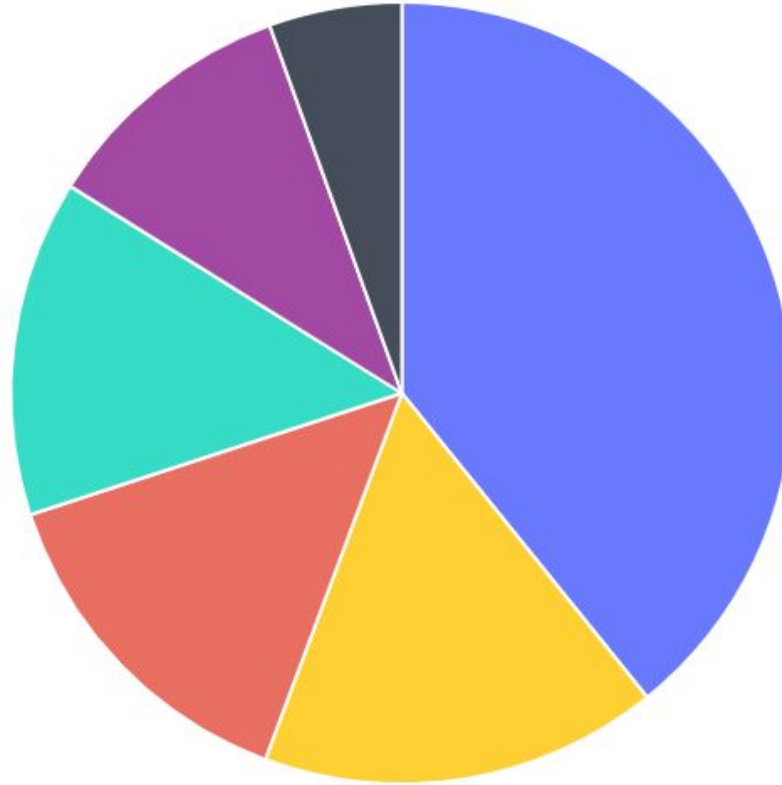- No ROI from AI Tools in Past
- Too Complicated to Implement AI Tools in Past

Plan For Proper Change Management In Your Organization

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Adoption doesn't just happen:

1. Prepare the organization for change
2. Share your vision and plan
3. Implement the change
4. Embed the change across your org
5. Analyze outcomes

Change Management

Start Small & Targeted

Get Evangelists & Cheerleaders

Involve Your Agents

Review, Refine, & Revisit

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My Recommendations

▶ Start with agent-facing technology — not bots

▶ Consider guidance, call summarization, coaching, WFO/WEM

▶ Start with small, easy tasks that can be automated

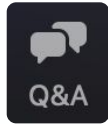▶ Expand once you have it down pat

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Key Takeaways

Understand AI & It's Limitations

Start Small With One Use Case

Focus On Change Management

Expand Strategically

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Q&A

Use the **Q&A button** on your screen to submit questions.

Q&A

Thank you for joining us today!

See Balto in action!
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To learn more about Balto,
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