



EBOOK

**The Contact  
Center  
Manager's  
Guide to AI**  
Step-by-Step  
Instructions on  
How to Use AI  
for Growth in  
Your Customer  
Experience

**broadvoice**

Take a moment and picture a stereotypical call center. What does it look like?

I see a sprawling room filled with rows of tightly packed cubicles. Phones are ringing. There's a murmur of conversation. Overhead, harsh fluorescent lights glow. Agents dressed in business casual attire are tethered to their desks by curly telephone cords as they read off a script into bulky headsets. The technology is rudimentary.

This version of a call center is a bit of a dinosaur.

The contact center industry was forever changed with the mass adoption of cloud technology, smartphones, and social media. Call centers quickly became contact centers, adopting new communication channels and embracing cloud technology.

It's no secret that technological innovation is necessary for success. According to a recent study, [nine out of ten companies](#) believe digital transformation is essential for growth. And nearly 80% say that without further transformation, they'll be at a competitive disadvantage within three years. That's why almost all [Fortune 1000 companies](#) (99%) are actively investing in artificial intelligence.

As the latest and greatest technology fad — artificial intelligence — takes hold, contact center leaders face another challenge: bridging the gap between what customers want and what their customer service offers. This begs the question: How do you use AI to enhance your customer experience? How do you successfully add AI to your contact center?

AI helps contact centers bridge the gap between heightened customer expectations and delivering a top-

notch customer experience. Using AI tools, contact centers can target the challenges and pain points that burden them most to drive more efficient operations, alleviate agent workloads, reduce costs, and improve customer satisfaction.

With this guide, you'll learn the ins and outs of AI-powered customer service: what steps you need to take to implement AI, how to integrate it into your operations, and how to maximize its value to improve your customer experience.





## Understanding AI in the Contact Center

Contact centers have their fair share of challenges.

For one, customers demand excellence, personalization, and speed — 24/7. And when those needs aren't met, they leave. In fact, one survey noted that up to [65% of customers](#) will change to a different brand because of one poor experience. Because contact centers are consistently burdened by high call volumes that strain resources, providing unique experiences can feel like an uphill battle.

What's more, many contact centers are plagued by excessive turnover and burnout rates. As a result, managers spend significant time and money training and recruiting new hires...only to have them leave in a few months.

AI has impressive benefits that help address each of these challenges. Here are a few things you can do with AI in your contact center.

**Analyze large amounts of data for a better customer experience.** AI can quickly process and analyze vast amounts of data, offering insights to help tailor the customer experience.

- **AI in Action:** The beauty retailer, [Ulta Beauty](#), consolidated its customer data and used advanced analytics to access more significant customer insights. With these insights, Ulta built personalized campaigns and provided customized recommendations, boosting [customer retention by 95%](#).

**Improve contact resolution rates.** With AI tools like intelligent call routing and virtual assistants, teams can resolve issues faster and more accurately, reducing the need for escalations and supporting a higher CSAT.

- **AI in Action:** [Central Bank](#) cut its call volume in half with the help of virtual agents. With an impressive 80% success rate in matching customer intent through intelligent call routing, the bank achieved a +50% reduction in calls to human agents.

**Reduce burnout and turnover rates.**

AI reduces burdensome workloads by automating repetitive tasks and reducing the number of customer inquiries handled by agents. The result? Lower burnout and turnover rates.

- **AI in Action:** [TGH Urgent Care](#) experienced high call volumes that overwhelmed its customer service reps. Using AI bots and IVAs, TGH Urgent Care [deflected hundreds of calls](#) and addressed after-hours FAQs. This new tech helped alleviate the pressure on agents, reducing burnout and improving their answer rate by 80%.

**Optimize workflows and workforce management.** AI helps streamline workflows and optimize workforce management.

- **AI in Action:** [CAA Club Group \(CCG\)](#) wanted to work more efficiently and enhance its labor management by creating forecasts and generating predictions. The team used [AI predictive analytics](#) to generate dozens of models that could predict call volume by interval, region, and type of service. This helped CCG build schedules, optimize its workforce, and operate more efficiently.

You can experience all these benefits (and more). Read on to see if you're ready to take on AI in your contact center.



**65% of customers will change to a different brand because of one poor experience.**

## Assessing Your Contact Center's AI Readiness

You can't expect to just buy an AI tool and see an immediate impact. First, you have to understand what your company needs from AI to help create a framework for your AI strategy.

These essential questions can help you discover what successful AI and automation implementation looks like for your team.

### Evaluate Your Current Setup

**What technology are you currently using?** AI should integrate seamlessly with your existing tools and tech. Start by getting the lay of the land and listing your technology. This likely includes your CRM system, contact center software, IVR systems, workforce management tools, etc.

**What manual processes do you have?** Evaluate which processes

are still performed manually. These may include call routing, data entry, retrieving customer information, and post-call documentation. These kinds of tasks are often time-consuming, tedious, and prone to human error, so they're perfect candidates for automation through AI.

**Where are the gaps and areas that need improving?** With a clear picture of your current setup, you can identify the gaps and areas of improvement. Look for inefficiencies, bottlenecks, and pain points affecting your contact center's performance, such as long call handling times, high employee turnover, and low customer satisfaction scores.

### Establish Your Objectives

**What goals do you have for implementing AI?** Goals help you identify and manage risk, gain employee/stakeholder buy-in, [boost team performance](#), and [execute strategy](#). Determine what you want to achieve with AI to evaluate the success

of your implementation. Are you looking to reduce average handling time (AHT)? Improve customer satisfaction (CSAT) scores? Increase first-call resolution (FCR) rates? Decrease operational costs?

**How do these goals align with company objectives?** Contact center AI can (and should) support the entire customer experience and fit into your company's broader strategy. By ensuring your goals align with the organization's big-picture objectives, you can create a lasting, seamless AI strategy across every touchpoint.

**With Broadvoice, you can find a solution that fits your unique business needs. [Request a demo to learn more.](#)**





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## Your Step-by-Step Guide to Implementing AI

With notes and goals in hand, it's time to implement AI. Here are some initial steps.

### 1. Develop a Plan and Strategy

#### Create a Roadmap for AI Integration

Think of integrating AI as running a long race. It helps to have a goal for how long it will take you to achieve full integration. Then, you can determine where your mile markers are along the way and adjust your effort and strategy accordingly. In other words, you need a detailed roadmap that outlines the general steps and milestones that will get you to successful integration in a reasonable time.

#### Get Early Buy-In and Involvement from Stakeholders

AI is daunting and disruptive, and its adoption will be a massive flop if you make decisions in siloes.

Before you start planning, you need to get buy-in from those who will be impacted by the addition of AI. This group might include executives, contact center managers, frontline staff, and IT personnel. Get everyone on board from the start by doing the following:

**1. Communicate the benefits.** Be clear on how AI will improve their work and contribute to the overall success of the contact center and customer experience.

**2. Involve stakeholders in planning.** Loop in necessary stakeholders — like your IT team and a core team of agents who can speak to their needs and concerns — and ask for their feedback and opinions. This fosters a sense of ownership and commitment to the project and ensures the product you purchase *actually* meets the broader needs of the team.

**3. Address concerns and expectations.** Start by being honest and recognizing AI's challenges and limitations. You

should address stakeholders' concerns, account for the gaps in AI tech, and manage expectations to prevent resistance and ensure smooth implementation.

### 2. Choose the Right AI Tools

Once you've developed a plan and strategy, you can move into vendor selection. Determine which AI tools and vendors best address your team's needs, fill operational gaps, and serve you best as a partner.

#### Determine What Tools Fill Your Gaps

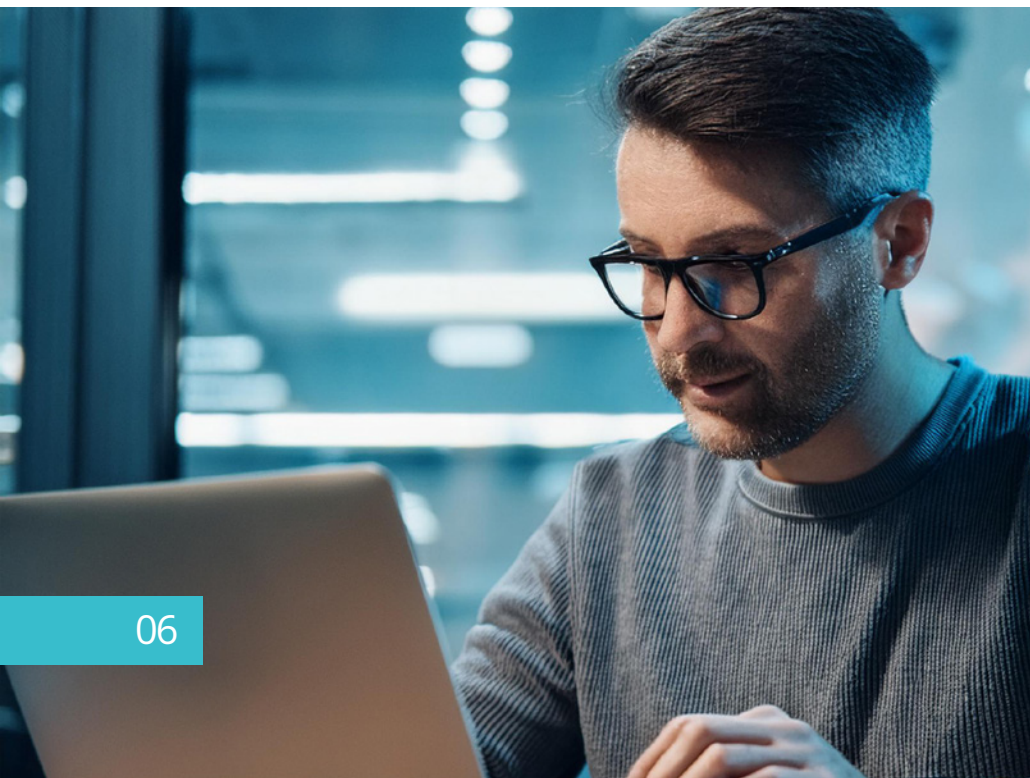
Finding the right AI solution is a bit like a puzzle — your operations have holes, and specific AI tools can fill them. To make the best investment, you need to determine which tools match the unique gaps in your processes.

For instance, your consistently high call volumes may be burdensome to agents and result in long hold times. To address this problem, you could search for solutions that expand your self-service.

Perhaps your customers primarily reach out to you via phone. It wouldn't make sense for you to invest in a chatbot on your website, but it would make sense to prioritize AI tools like intelligent virtual assistants (IVAs) to handle routine inquiries via your phone line. In this instance, you could lower hold times and improve self-service by integrating an IVA into your IVR system.

#### Look Beyond the Feature List

A vendor might offer all the right features, but that doesn't mean they're the best partner. Here are some things to look for in an AI solution.



- **Ease of integration.** How easily does the tool integrate with your existing systems and workflows?
- **Scalability.** Can the tool scale to meet the growing needs of your contact center?
- **Support and training.** Does the vendor provide adequate support and training to help you onboard and integrate their tools?
- **Cost.** Is the solution cost-effective? Can they demonstrate ROI?
- **Vendor reputation.** What is the vendor's track record and reputation in the industry? Can they provide case studies illustrating their success?

### 3. Prepare and Manage Data

To get high-quality insights using AI, you have to input high-quality data. Your data should be accurate, consistent, and error-free.

But quality isn't the only consideration. To get the most from AI, you need quantity **and** quality in your data. Essentially, the more data you have, the better your AI tools will perform over time. Why? With machine learning, AI learns your customers and processes, generating increasingly personalized insights about your operations and customers over time.

Prepare your data for AI integration with these three steps:

1. **Collect data** from sources across your operations: your knowledge base, customer interactions, feedback forms, call recordings, and system logs.
2. **Scrub your data** and remove duplicates, errors, and inconsistencies.

3. **Label your data** to provide context and meaning. For example, categorize customer interactions by topic or sentiment to help your AI tools understand and process the information.

Discover AI tools to fit every use case in your contact center. See how [Broadvoice](#) can help [today](#).

### Integrating AI into Your Daily Operations

#### 4. Invest in Training and Development

Technology moves fast, so training and development are critical when adding anything new. In fact, [IBM reports](#) that employees need re-skilling/training in technical skills every 2.5 years to stay relevant and up-to-date with the latest technology. And, according to [Seismic](#),

organizations that regularly invest in employee training see [11% greater profitability](#).

Effectively adding AI to your daily operations hinges on comprehensive training and development. Here are a few suggestions.

- **Conduct thorough training sessions** to help staff become familiar with the new technology. During these sessions, cover the tools' benefits. Explain their functionality and demonstrate how they integrate with your existing processes and systems.
- **Provide hands-on workshops** where staff can practice using the tools in a controlled environment before using them with customers.
- **Tailor your training to different roles** within the contact center. For example, agents need to know how to interact with AI-



powered virtual assistants, but your management team should focus on WFM tools, monitoring AI performance, and interpreting data insights.

## Boosting Your Customer Experience with AI

### 5. Personalize Customer Interactions

More and more brands are [placing personalization](#) at the center of their enterprise strategies.

Companies can use AI tools to analyze and collect customer data to create high-quality customer experiences that lead customers to specific goals across the customer journey. If you want to stay competitive, it's essential to use AI to segment customer data and tailor your services to meet the specific needs of different audience groups.

Let's look at what this looks like using a brand we all know (and love!). [Starbucks](#) is a pro at [using personalization](#) to improve their CX and retain customers. The app uses a rewards program and occasional

gamification to deliver offers based on order history and personal preferences. Their digital ads and drive-through menus are also highly targeted, pulling data from local weather, inventory, and customer behaviors. And it does all of this using AI-powered advanced analytics. Pretty cool, huh?

Give your personalization strategy a boost by using AI to:

- **Tailor recommendations.** With AI, you can track customer behavior, purchase history, and demographic information to tailor recommendations, such as suggesting resources they should explore and what they should buy next.
- **Customize communications.** Use AI-powered sentiment analysis to assess the tone and attitude of your customer communications. With AI, you can look at how customers have interacted with your brand in the past. Then, agents can use those insights to adjust interactions to make them more engaging and relevant.
- **Get proactive.** With predictive

analytics, you can anticipate issues before they arise. AI can notify your team when customers repeatedly search for specific questions or watch for disengagement and disgruntled tones in a conversation. With these insights, you can get proactive in addressing potential problems.

### 6. Automate Routine Tasks

When you automate routine tasks, you do more than just erase items from your to-do list. You upgrade your customer and agent experience. Here's an example of how automation can transform an interaction.

**Without automation:** Ian is a contact center agent for an internet service company with outdated tech and no automation tools. He answers the next call in the queue. The customer, Christy, wants to report a connectivity issue. Before he can help her diagnose the issue, he needs to locate her account details.

Ian puts her on hold for a few minutes while he navigates the clunky search tools in their database to find







her profile and verify her identity. While they chat, Ian repeatedly pauses the interaction, asking her to repeat what she said so he can adequately document it. Christy grows irritated and annoyed that such a simple task is taking so long to resolve. Then, once he finally diagnoses the issue and hangs up with Christy, he has to spend another 10 minutes clicking through her profile and the ticketing system to document the issue and solution.

**With automation:** This time, imagine Ian has advanced automation tools. When Christy calls to report an issue, Ian immediately receives a screen pop with her account information and a summary of her recent activity. The system has also verified her identity using voice recognition. As they discuss the issue, an AI-driven tool transcribes their conversation in real time, allowing Ian to focus on diagnosing the problem. Once the issue is resolved, the system automatically documents the call, including the problem and the solution, and updates Christy's profile in the ticketing system.

When you allow automation to handle

admin tasks, agents have more time to focus on customer interactions. They aren't slowed down by annoying tasks that cause awkward pauses and hiccups in the conversation. Plus, they're less rushed to get the call over with. Instead, automation allows them to intentionally focus on the more complex and nuanced issues that demand the human touch.

Turn efficiency into ROI with Broadvoice. [Chat with a consultant to learn more.](#)

## Measuring Your Success and ROI

### 7. Track Performance

AI tools aren't one-size-fits-all solutions. They're malleable, adjusting to the unique needs of your contact center. But AI can only succeed if you regularly track and optimize it. Regularly tracking your AI performance will help you:

- Identify where AI tools are underperforming so you can adjust as needed.

- Proactively adapt to changing customer expectations and operational needs.
- Empower your team to use AI more effectively, maximizing ROI and boosting customer experience.

To get the most from AI tools, you need to make friends with metrics. You should establish clear KPIs to measure the performance of your AI tools and identify what success looks like for each one. Then, monitor the implications and adjust your strategy as needed. Need a visual? Here are a few metrics AI usually impacts.

Metric	Projected Change	Actual Change	Trend
Customer Satisfaction (CSAT)	+15%	+12%	Upward
First-Call Resolution (FCR)	+18%	+20%	Upward
Transfer Rate	-10%	-8%	Downward
Average Handle Time (AHT)	-15%	-13%	Downward
Cost Per Call	-5%	-8%	Downward
Customer Effort Score (CES)	-12%	-10%	Downward

Use dashboards and analytics tools to effectively monitor your metrics and gain real-time insights and detailed visual reports. Be sure to pull data from every aspect of your tech stack to get a complete picture of your AI implementation. Specifically, you should pull data and analytics from your CRM system, contact center software, and workforce management platform to really understand the impact of AI and automation on your customer and agent experience.

## 8. Calculate Your ROI

Microsoft has found that, on average, businesses report a [3.5X return](#) on their AI investments. Is your company seeing the same impact? Knowing your ROI can clarify AI's effect on your business, justify the expense, and help you determine which future investments are worth your time and money. You can calculate ROI with a simple formula:

$$\text{ROI} = \frac{\text{Cost Savings} + \text{Revenue} - \text{Total Cost of Ownership (TCO)}}{\text{Total Cost of Ownership (TCO)}}$$

Let's break that down.

- **Cost Savings:** Calculate the reduction in operational costs due to automation.
- **Revenue:** Measure the revenue increase attributed to AI-driven initiatives. To find this, you might look at improved customer acquisition, cross-selling, upselling, and personalized recommendations to AI-defined customer segments.

- **Total Cost of Ownership:** Subtract the cost of owning and operating your AI tools. When you initially integrate, you'll face upfront costs for licensing, training, and deployment. Over time, you may also have operating costs, such as maintenance and support fees. All of these play into your TCO.

The number you get from the formula gives you an excellent sense of the tangible ROI of AI. However, there are some intangible and long-term benefits worth accounting for. Some of these include:

- **Productivity gains.** Measure productivity gains using core KPIs. For instance, you could calculate the increased number of handled queries and improved resolution rates. You can also assess other productivity improvements, such as faster decision-making, time savings on tasks, lower error rates, and increased output. Although productivity gains are sometimes comprehensive, they play into your ROI.

- **Customer retention.** Evaluate the financial impact of higher customer satisfaction and loyalty by comparing customer retention and loyalty gains before and after you added AI. Has AI improved customer churn rates? Is your NPS higher than before you added AI?
- **Continuous improvement.** AI systems learn and improve over time, increasing their efficiency and effectiveness as you use them. Assess whether your operations and quality have improved since you added AI. Although continuous improvement is more of an intangible benefit, it contributes to the value of your AI investment.





## Prepare for the Future

Contact centers don't need to be money pits that suck up all your resources. When your team embraces innovative and advanced technology, you can transform your contact center from a cost center into a revenue-generating department. Now's the time to embrace the power of AI and encourage continuous learning and development by adopting new tech. With AI, your contact center can step into the future to create memorable and exceptional customer experiences.

**Partner with Broadvoice to embrace AI innovation, scale your business, and deliver quality customer experiences. [Chat with a consultant today to get started.](#)**

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