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Increase
CONTACT CENTER EFFICIENCY
and
CONVERSATIONAL AI-READINESS
in Just Three Steps

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Some vendors still try to sell conversational AI as a spectacular out-of-the-box panacea. Yet, studies show this is anything but the case.

Indeed, a recent Gartner survey showed that only eight percent of participants used a chatbot during their latest customer service experience.

More troublingly, only a quarter of that eight percent said they would use that chatbot again.

Most will blame the technology, which will continue to improve. Indeed, despite all the impressive GenAI innovation, it's far from plug and play.

However, it's not always the fault of artificial intelligence; often, ineffective conversational AI is missing the human intelligence behind it.

Before deployment, contact center leaders must determine their core contact drivers — otherwise known as "intents" — and the most efficient way to address them. Then, they'll know where conversational AI can add value.

Efficient contact centers don't skip past that piece of the conversational AI puzzle. After all, as Bill Gates once said:

> "The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency."

Unfortunately, understanding how to best handle each intent as efficiently as possible is something that has troubled contact center leaders for years.

Poor intent data, lack of collaboration with adjacent departments, and inflexible solutions paved the way for an acceptance of broken, inefficient processes.

If that sounds a little too familiar, this whitepaper will show how you can overcome these issues and lay the foundation of conversational AI with a three-step process: discover, remove, and improve.

Step 1 – Discover the Pain Points

The Historical Methods

Conventionally, contact centers have had two options when uncovering their most prominent customer intents:

1. **Use disposition codes**

2. **Implement a conversational intelligence platform**

The first requires agents to enter a code into the CRM system after every customer conversation, which reflects the intent. To do so, they choose from a ready-made selection.

Yet, that method has many faults. For starters, agents often rush through their post-contact processing and choose their favorite code or the one at the top of the list. Meanwhile, they are sometimes unsure of which code applies to the conversation they've just had.

All of this results in inaccurate data — which no organization wants to plug into an AI model.

Of course, this may underscore the need for disposition codes to become a critical part of the contact center coaching and quality assurance (QA) process.

Nevertheless, even with the perfect coaching and monitoring strategy, disposition data will be skewed. After all, the code options are static and don't account for emerging contact reasons.

As a result, the agent must often enter a false code or add a new code to the list. In no time at all, that last option becomes unmanageable.

Recognizing these issues, some contact centers have bolted on a conversational analytics engine to their contact center platforms.

These work like a charm, pinpointing the emerging and persistent customer intents, providing useful data in dashboards, and allowing the contact center to run cost analysis initiatives. They also enable the team to estimate how much each intent costs the business.

The problem? Well, these solutions are too capable, meaning that the price tag is often eye-watering. Moreover, usability is typically an issue for contact centers without in-house IT teams.
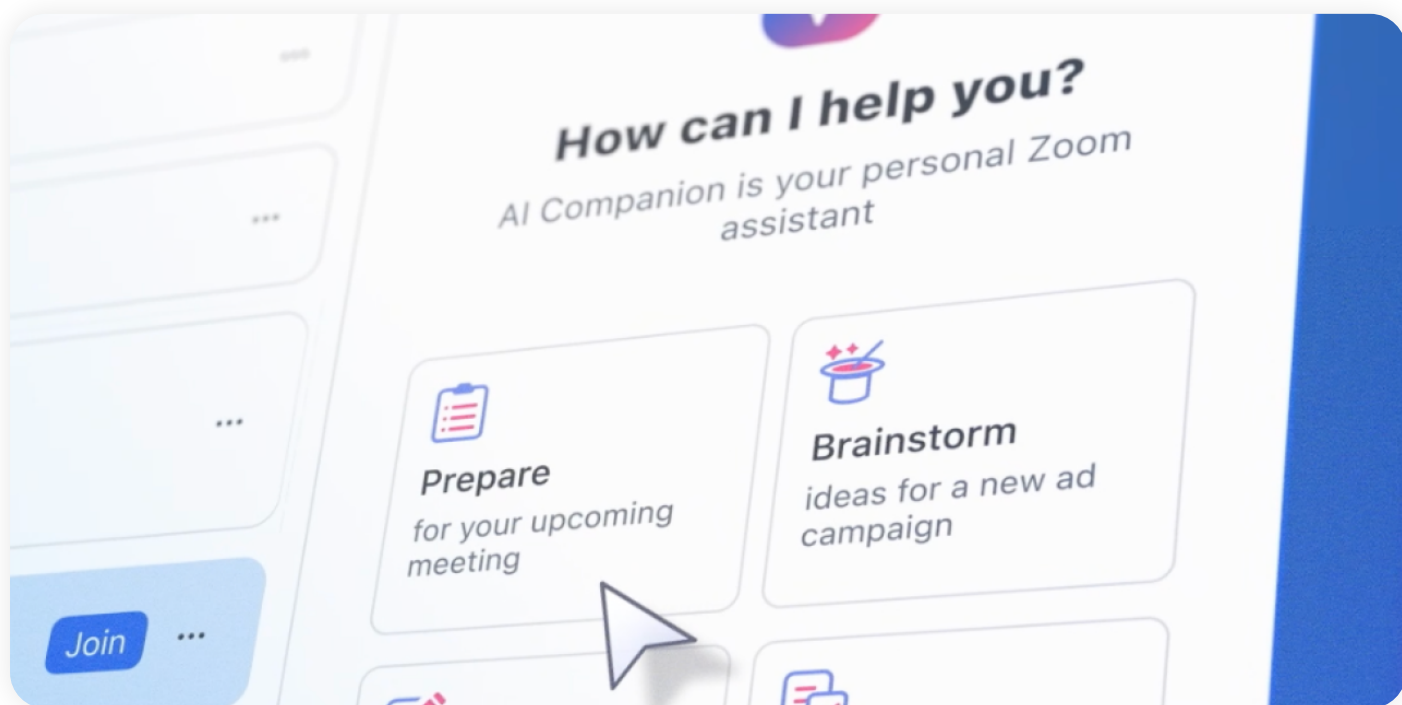
The Easy Way

It took years for tech providers to engineer tools that could monitor customer intent. Now, large language models (LLMs) can do it out of the box.

Moreover, CCaaS vendors are using LLMs within their agent-assist toolkits to automate the contact dispositioning process — some at no extra cost.

Consider the LLM-powered Zoom AI Expert Assist as an example – which comes part-and-parcel with Zoom's Elite CCaaS package. The virtual assistant supports agents as they complete various tasks – from retrieving knowledge base content to leveraging it in auto-generated customer replies.

One of those tasks is summarizing every contact center conversation in a neat, consistent format and uploading it to the CRM. That summary includes a call reason.

The contact center may then dashboard those contact reasons inside its CRM, uncover their top 10–20 intents, and run cost-analysis exercises to determine the price of every pain point behind the intent (more on this later).

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Step 2 – Remove the Pain Points (Where Possible!)

Unpack the top 10–20 intents collated in step one and consider: what broken processes drive this demand? Engaging with agents, reviewing conversation transcripts, and running through the customer journey will offer the answers.

After, the contact center will have amassed a list of broken processes, which they can then sort into three buckets:

- **Internal – Processes the contact center can fix itself.**

- **External – Processes that require the assistance of another department to fix.**

- **Policy – Processes that are fundamental to business operations and will likely require leadership intervention to address.**

By grouping its broken processes like this, the contact center can prioritize its journey improvement efforts — which starts by urgently fixing those internal issues.

Then, it gets trickier, as the contact center must tackle its external and policy problems. That requires cross-functional collaboration.

That can be tricky if the contact center operates in a silo. But, thanks to CCaaS-UCaaS integrations, interdepartmental communication is easier than ever.

Unfortunately, that still doesn't mean that each department will act. That's where the cost analysis comes in (from step one), which allows the contact center to show their cross-functional colleagues the implications of each issue.

Furthermore, the contact center can share feedback from customer calls and social media to paint a picture of just how pressing the problem at hand is.

Finally, service leaders may offer support to fix the issue.

Each tactic can help inspire action that removes pain points and lowers the load on the contact center. The business can also reduce customer effort, which is critical to driving loyalty.

Indeed, as the acclaimed Harvard Business Review article "Stop Trying to Delight Your Customers", once noted:

> "Delighting customers doesn't build loyalty; reducing their effort—the work they must do to get their problem solved—does."

Unfortunately, not all broken processes have simple fixes that entirely remove each intent from the contact center. That's where conversational AI comes in.

When Removing the Pain Point Is Not So Easy...

Internal fixes and cross-functional collaboration won't stop all customer queries from flowing into the contact center.

For these remaining intents, contact centers must consider and define the best way to have this conversation.

Still, that doesn't mean that live agents must be involved. After all, an efficient service operation has more strings to its bow to "remove" the contact. Namely, conversational AI and proactive outreach.

The latter helps inform, adjust, and optimize customer behavior so they no longer need to reach out.

For example, suppose a prominent contact reason is customers missing an appointment and asking to reschedule. In that case, the service team can start sending timely messages — before each appointment — to avoid the issue in the first instance.

Nevertheless, conversational AI is likely to be the most effective weapon in the contact center arsenal, snapping up the remaining contacts that follow a simple, transactional contact resolution path.

Making a reservation, tracking deliveries, and checking for an update in a process are all excellent examples of queries businesses can automate with conversational AI.

In addition, advanced conversational AI platforms can now automate slightly more tricky customer queries, thanks to integrations with various enterprise systems, embedded biometrics for customer authentication, and exciting new GenAI features.

However, brands may prefer a human to handle particular retention-critical contacts — such as complaints — to deliver empathetic customer service. Moreover, virtual agents won't fit the bill for more complex queries, which often feature long, rambling stories.

Nevertheless, in these instances, the contact center can still streamline and improve agents' processes to maximize customer, employee, and business outcomes.

Step 3 – Improve the Experience
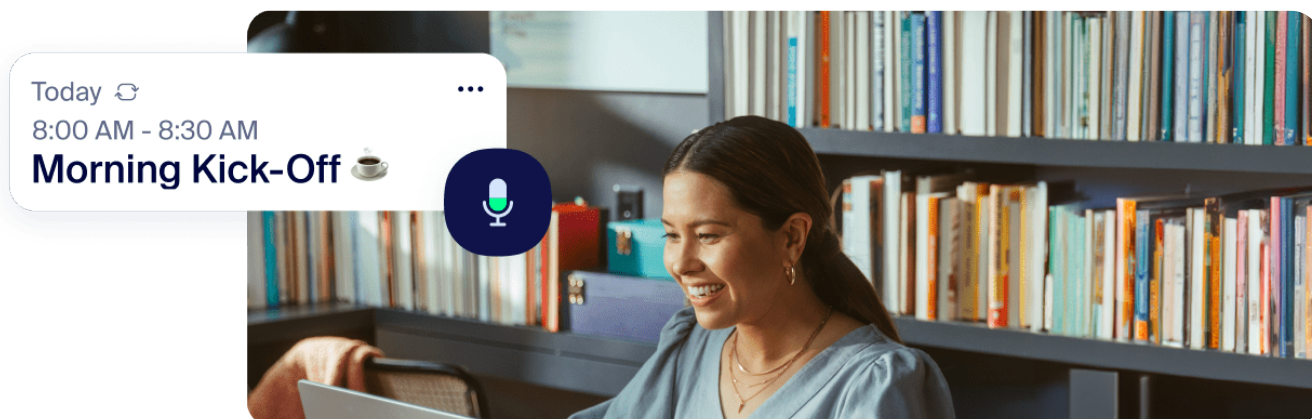
When queries are too tricky to remove via process tweaks and self-service, contact centers should create a plan for enhancing the journeys agents follow when handling them.

Again, this starts with the question: what is the best way to have this interaction?

To uncover the answer, engage with the highest-performing agents across the targeted intent, standardize the optimal workflow, and spot opportunities to simplify it further.

Such opportunities often involve desktop automations, so agents don't have to perform time-consuming tasks. These may include form-filling, copying and pasting information, launching third-party applications, and more.

Zoom AI Expert Assist can also support these new workflows by proactively feeding agents information — such as CRM data or knowledge-base content — that can help speed the journey along.

Yet, perhaps most beneficial is a workforce engagement management (WEM) suite that monitors agent performance and checks whether they're following the optimal workflows. After all, many will stick to what they know or employ workarounds that limit first contact resolution (FCR) rates.

> Gartner uncovered this troubling trend last year, finding that 45 percent of contact center agents avoid adopting new technologies and workflows.

However, by engaging with agents to develop these optimal workflows and determine standard operating procedures (SOPs), the contact center can mitigate this problem.

In addition, with an employee experience tool such as Workvivo, the contact center can leverage learning management, video streaming, and even podcast creation tools to help coach teams on these SOPs.

Most crucially, Workvivo also offers recognition tooling to reward agents that follow the optimal workflows — alongside those that provide feedback to enhance them further.

Triaging and Routing Contacts

A WEM suite — such as Zoom's offering — automatically attaches a quality score to every contact center conversation, while also delivering each of the capabilities above.

That insight is gold dust, allowing the contact center to spot the best channel to resolve each issue.

As such, it's no surprise that a quarter of organizations are migrating to the cloud to leverage more sophisticated AI and analytics capabilities that drive quality management (QM) and provide greater precision — as per recent IDC research.

Indeed, with these QM insights, service leaders may devise a strategy to triage the customer in their channel of choice, learn their intent, and route them to the best channel for resolution.

In addition, this approach allows the service team to intelligently prioritize support based on factors such as urgency or churn risk.

Contact centers can leverage conversational AI to perform this triaging, which is much more dynamic than a conventional, cumbersome IVR solution.

Additionally, with a bot on the front end, the contact center could reconsider its routing strategy by matching the customer to an agent that scores best — according to WEM data — for their intent.

Such an approach can help improve customer satisfaction, handling times, and agent stress levels — especially over older routing strategies like next-available agent.
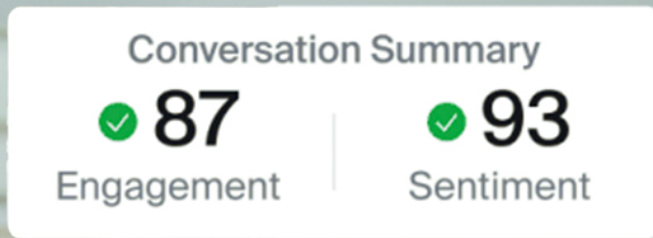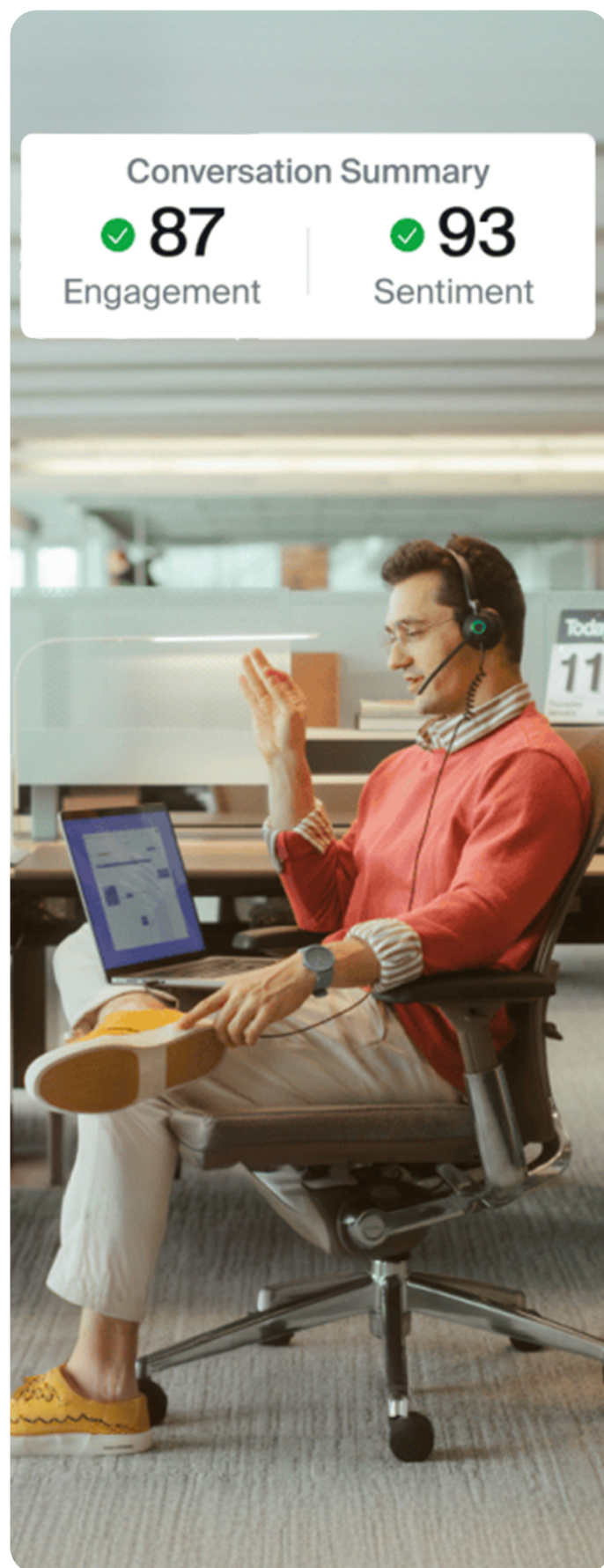
Summary

With 50 percent of European enterprises set to invest in conversational AI, the market is thriving.

The good news: it's easier than ever to build a chatbot. The bad news: results will not meet customer and business needs unless that all-important discovery work falls into place.

Thankfully, the generative AI wave has delivered a new breed of more affordable intent classification tools, which surface the foundational data to complete that discovery work.

With this, the contact center can engage in intent-level journey orchestration.

Such orchestration involves connecting siloed departments around the most pressing customer intents and plotting a path to remove the pain points that drive them.

Departments can often make sweeping changes to remove the intent altogether. When this isn't possible, the contact center must consider the optimal route to resolve the query.

When that route follows a simple, transactional path, targeted applications of conversational AI — across each customer engagement channel — will help get the job done.

However, even when the query is too complex for conversational AI, it can act as a triage that meets the customer in the channel of their choice.

In doing so, the bot can recommend the best channel to help the customer resolve their query — perhaps via click-to-call, click-to-chat, or click-to-message links.

Yet, not only can the bot pass the customer to the best-placed channel, it may also pass them on to the optimal agent, who excels in responding to the query they have.

The tech exists to make this possible. Consider the Zoom Unified Platform for CCaaS and UCaaS, which houses intent recognition, WEM, Workvivo, and other mission-critical solutions.

The difficulty is bandwidth, given the day-to-day firefighting that's — unfortunately — the norm in most contact centers.

Nevertheless, understanding those cornerstone intents and the journeys behind them is essential for any contact center conversational AI or automation roadmap moving forward.

Find out more about AI and the Zoom AI Unified Platform for CCaaS and UCaaS by watching the following on-demand webinar: The AI Advantage in Customer Experience: Strategies for Leaders